

Project A-619
Technical Report No. 4

AUDIT AND EVALUATION OF MANUFACTURING OPERATIONS
IN CARROLL COUNTY, GEORGIA

by
M. Dale Henson
and
Robert H. McDonough

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Foreword

Before this fourth report in the series being carried out on Carroll County was ready for publication, follow-up work had begun on possible opportunities for (1) developing service or "satellite" industries which might relate to or support the existing industrial complex, and (2) diversifying or expanding established plants. This work is now in process.

Like the preceding reports completed as part of this project, this one has had several purposes. One of these was the accumulation of data needed before the studies in process could be undertaken. A second purpose was to determine what problems established firms might be facing which might slow or stop their future growth. Technical assistance has already been provided to several companies as a result of the study's identification of a variety of problems.

Other work in process and work planned in the months ahead will concentrate on other problems affecting the profitability and growth of existing industry. An analysis of the need for industrial vocational training facilities, already underway, is one example.

Previous reports in this series focused on industrial sites, park and recreation facilities, and retail and wholesale trade. Inquiries regarding any of these studies will be welcomed.

Kenneth C. Wagner, Chief
Industrial Development Division
GEORGIA INSTITUTE OF TECHNOLOGY

INTRODUCTION

Objectives

Consistent with the primary objective of the program sponsored by the Area Redevelopment Administration in Carroll County -- to produce new pay-rolls suited to Carroll County at the earliest possible time -- this study of the county's manufacturing operations is meant to serve as a basis for job creation in the existing industrial sector. Specifically, the over-all purpose of this study is to identify opportunities for economic growth offered by existing industry in Carroll County, either through expansion or diversification of present product lines, or through the development or attraction of other companies which may be interested in relating their operations to the needs of the firms already established in the area.

More than any other one factor, the quality of management determines the extent to which the industrial firm prospers. In order to maximize the welfare of his firm, the manager must be alert to every opportunity, not only in his established product line, but also in other related or even unrelated lines. Many opportunities have been lost due to management's inability or unwillingness to look beyond the traditional definition of his firm's objectives -- objectives established not by the manager himself, but by the industrial environment in which he operates.

Since the primary concern here is with existing Carroll County firms, especially their potential as new job-creating agencies through expansion and product diversification, one of the most significant determinants of prosperity -- the quality of management -- had to be evaluated. As well as being the central motivating force in a firm, management can conversely be the single strongest deterrent to growth. The approach has been to record the experiences, reactions and opinions of management on matters relating to problem areas in the workaday world of the industrial manager. Information was sought not only on internal operating difficulties, but also on matters external to the firm: community relations, tax environment, local political and power structure, and inter-firm attitudes and cooperativeness within the community. The summary of these experiences, along with impressions of an outside observer, should provide a basis for the careful nourishment of the generally healthy business climate found in Carroll County.

As the economic influence of Atlanta extends further into the surrounding counties, so must the economic consequences of this extension on these counties receive full consideration in a program of industrial development. Since Carrollton, the county seat and geographical center of Carroll County, is only 50 miles west of Atlanta and since Atlanta's home county of Fulton actually borders Carroll County, it is obvious that Atlanta's influence cannot be ignored in matters relating to the growth and development of Carroll County. This was kept firmly in mind during this analysis of Carroll County's industrial complex, and real or likely impending conditions that bear on the present or future industrial growth of Carroll County were evaluated within this analytical framework.

Approach^{1/}

Prior to the start of the survey of Carroll County manufacturers, which forms the basis for this report, a detailed approach was developed for accomplishing the stated purpose of this phase. The following procedures were followed:

1. Before field work was begun, information on industrial activity in the Carroll County area was accumulated from various sources. The principal sources included: Atlanta Regional Office of the Housing and Home Finance Agency for data accumulated as part of the research phase of public housing programs in Carroll County; Georgia Department of Labor for current and historical data relating to employment and wage payments; Georgia Manufacturing Directory, 1960-1961, compiled by the Industrial Development Division, for a list of manufacturing firms by city and industrial classification; Carrollton Chamber of Commerce for specific information regarding the development and growth of existing firms; and Industrial Development Division files for general information on industrial and economic activity in Carroll County.

2. In order to facilitate the orderly completion of the industrial survey and to coordinate the efforts of the survey team, a detailed plan was developed for interviewing each manufacturer in Carroll County. This plan outlined the procedure to be followed in preparing and scheduling the mailing of introductory letters to the firms, establishing specific interview dates and times, maintaining records of interviews scheduled and completed, conducting interviews, and making preliminary reports on the surveyed firms.

^{1/} A detailed description of methodology will be found in Appendix 1.

3. Following each plant visit, a concise report was prepared on the firm. The reports were standardized for analysis purposes, following the format established by the interview guide. Copies of these reports were made available to all staff members for use in other phases of the project.

4. The individual reports on each manufacturer were grouped according to industry and synthesized into complete descriptions of each industry in Carroll County. These industry profiles are found in a later section of this report. This facilitates the continuing analysis now being made of survey data to mark specific expansion or diversification opportunities and needs for technical assistance.

5. Technical assistance is being provided to individual manufacturing firms as required to identify and resolve problems affecting efficiency and growth.

6. Through subscriptions to the local newspapers, meetings with local civic organizations, and contacts with individual manufacturers, a finger is being kept on the economic pulse of Carroll County. Developments that are likely to offer potentiality for any firm are quickly made available to its management; further assistance is offered if interest in following up any lead is evidenced.

Background

The industry survey team was, in general, well received by Carroll County manufacturers. Not unexpectedly, the more progressive managers were more responsive to the questions and were in enthusiastic accord with the aims and objectives of the over-all economic development program. Often, however, the interview team members were faced with an indifferent firm representative who, though willing to devote some time to discussion of the program, obviously had little or no interest in county-wide or even community-wide projects of this nature. In view of the advance publicity given the program by newspapers and local civic organizations, it was surprising to find so many firm representatives who had no idea that such a program was in progress.

In only a few instances were obvious attempts made to thwart the interviewer's efforts to make an appointment. Permission to visit their plants was denied by two firms. One manager wanted to clear it with his home office, and the visit never materialized. In the other case, the owner-manager of a large facility pointedly refused to answer any questions regarding his firm or its operations. His reaction is an extreme example of an attitude which is

not uncommon to owner-managers in those industries that have long dominated the industrial structure of southern communities and who fear their position is now being threatened by the newer, higher-wage industries that are moving into the area. In this particular case the manager's negative attitude was amplified by the failure of the local coordinating agency to inform him of the development program. To compound the oversight, his name was placed on a committee without his permission. Other managers in the same or related industries registered varying degrees of complacency toward the development program.

The above comments are not meant as reflections of the attitude of Carroll County industrialists in general -- too many of them are sparked by drive and imagination and willingness to explore new opportunities to worry about defending their firm or industry from those new "employee-pirating" firms that are moving into the area. The expressed and implied opinions of the managements of the older industries should, however, focus attention upon the special problems faced by these firms in a community or county economic and industrial development program. Typically low-wage, depending upon the local labor force for a continuing supply of unskilled labor, operating on very narrow profit margins, and caught in a cost-price squeeze, the firms are understandably edgy about a program that they fear might adversely affect their position. Special efforts should be made to educate these manufacturers as to the objectives of the program and their active support should be cultivated.

Many industrialists were somewhat surprised that their help was being sought to upgrade the county economically through the development of business and industry. Comments included: "Why should I help to promote industry in this town to compete with me in the labor market?" "We want to be sure that we get the right kind of industry in this area. Some people get excited and want to bring in any kind of industry, but we are selective and want the right kind of industry." It is obvious that an intensive program is required to inform the manufacturers in Carroll County of the mutual benefits that accrue to their firms and their communities from increased industrialization.

Some managers of established manufacturing firms were understandably disturbed that their tax money was being used to provide services for some of the new firms as part of a "packaged" industrial development program. According to some of the older firms, these same services were either not provided for them, or considerable time and effort were required to secure the services

for their firms. A certain amount of resentment is a natural result under these conditions. Such resentment can be considerably softened if a medium is provided through which local industrialists can air their views and grievances and can be assured that their collective voices will be heard and their recommendations given full consideration.

As the above discussion indicates, there is a real need for a county-wide organization exclusively for manufacturers. Manufacturing firms are faced with problems that are unique to a production facility. Existing civic and trade groups in Carroll County cannot effectively provide the industrialists with a medium through which they can communicate with the rest of the community. Just as the Merchant's Association in Carrollton and other Carroll County communities should be revitalized, so should an industrial council be formed for the manufacturers. Through regular meetings common problems relating to labor, raw materials, services, distribution and the myriad of other factors with which a manufacturer is constantly faced can be freely discussed with the knowledge that each person present is equally concerned. Through a free interchange of information and ideas, a cooperative spirit and sense of common purpose could evolve which would serve as a stimulant not only to the manufacturer but to the community and county as well. Effective solutions to problems can be shared with a resultant strengthening of the entire industrial community.

Other cities have formed industrial councils and have had great success with them. Such a group in Carroll County could operate as a unit of the proposed County Chamber of Commerce, sharing its facilities and using its general membership as a sounding board for proposals. Presently the industrial sector does not have a collective voice in local affairs.

Perhaps this explains the relative lack of participation in civic affairs by the manufacturers. There are a few industrial leaders in the county, notably in Carrollton, who are consistently found in positions of responsibility on community projects. In proportion to their total number, however, only a very few industrial managers participate.

Efforts were recently made by the Industrial Development Division to help Carroll County manufacturers locate new markets for their products. Letters describing the proposed program were sent to 25 selected firms. This was to be a pilot study, the degree of response to determine the feasibility of offering the service to all firms in the county. Briefly, the plan was to send interested firms leads on government contract and export-import trade opportunities and to help them follow through on potentially profitable leads if they

desired such assistance. They were asked to reply if interested. Five replies were received representing six firms. Leads were sent to all of these manufacturers, and they were followed up to some extent by three. It is not known if any of them were carried to fruition.

This should not be interpreted as wholesale apathy among these manufacturers. Many of them have well established markets for all of their output at present. Others may have had unpleasant experiences with government contracts or were unwilling to accept the thin profit margins sometimes associated with government work. The idea of exporting seldom gets beyond the thinking stage, especially in small firms. This is due in large part to a fear of the unknown or an unwillingness to face the complexities of foreign trade. Since the Industrial Development Division offered assistance to each of these firms in the hurdling of the real or imagined obstacles, however, it would be completely unrealistic to say that no apathy exists among Carroll County manufacturers.

Many firms are perfectly content with their operations as they now stand -- in terms of size, market strength and depth, efficiency and product. And these managers (usually owner-managers) were quite willing to admit this in answer to the question on obstacles to growth put to each firm.

During the survey, special attention was called to the technical assistance feature of the development program. Managers were advised of the facilities and talents that are available and were encouraged to take advantage of them by calling on the staff of the Industrial Development Division at any time. While there was general agreement among the manufacturers that such direct, personal assistance would be a virtual windfall, there appears to be a problem in translating their enthusiasm into specific requests for assistance. This is evidenced by the lack of response to the program. It is no idle theory that the most critical task in resolving difficulties of any kind is the pinpointing of the problem itself. Perhaps Carroll County manufacturers would profit by spending more time in the identification of specific problem areas in their operations.

RECOMMENDATIONS, FINDINGS AND CONCLUSIONS

Recommendations

Industrial Council. It is recommended that an industrial council be formed to represent the interests of Carroll County manufacturers. This group could operate as an arm of the proposed County Chamber of Commerce or as an independent organization. With the general membership composed of all Carroll County manufacturers, the council would provide a medium through which the industrial community could speak and would serve as a meeting place for the interchange of information and ideas which relate to the common problems of industrialists.

Vocational-Technical School. It is recommended that immediate action be taken to expedite the establishment of vocational-technical training facilities in Carroll County. The survey of manufacturers indicated an abundance of labor in the area with good characteristics. However, needed skills are not available. Trained mechanics and other maintenance workers are particularly in short supply. An area school would provide training and educational opportunities for the youth and adults of the area and would serve the basic training needs of established business and industry. Furthermore, the attraction of new industry to the area would be greatly facilitated if a source were provided for a continuing supply of technically trained workers.

Service Facilities. It is recommended that further study be directed toward determining the adequacy of present service facilities in Carroll County. For example, many firms carry equipment and machinery to establishments in Athens, Atlanta and Rome for repair and overhauling. Also, machine repair parts and mill supplies are largely purchased outside the county. Further studies are required to determine if the volume of these and other service requirements is such that additional facilities should be considered for Carroll County.

Civic Participation. It is recommended that manufacturing management be encouraged to participate more actively in civic affairs. Among the small manufacturers there is considerable complacency toward projects requiring community and county-wide support. As a promoter of involvement in civic actions, the formation of an industrial council can be an effective catalyst. But a strong and continued program of education is required, stressing the interdependence of all facets of the economy and concentrating on the role of the small manufacturer.

Male Employment. It is recommended that primary industrial development efforts be directed toward the attraction and growth of industries that typically have a high male-female employment ratio. There is an imbalance in male-female employment in Carroll County which results from the dominating influence of the apparel and textile industries -- almost as many women hold industrial jobs as men. The metalworking industry appears to offer the best possibilities for providing additional employment opportunities for men.

Industrial Relations. It is recommended that Carroll County manufacturers pay closer attention to industrial relations practices. Recognition of the needs of the employee is essential to the preservation of the unusually healthy industrial climate in Carroll County. Through bargaining on a personal basis with employees and continually monitoring the informal channels of communication through which employees make their sources of discontent known, the employer can anticipate and eliminate problems before dissatisfaction is manifested in more burdensome ways.

Existing Industry. It is recommended that local development groups devote more attention to the problems of existing manufacturers in the area. There is a tendency to regard an economic and industrial development program as being concerned exclusively with the enticement of new industry into an area. The needs of the established firms are typically subordinated to the more dramatic efforts to attract new, possibly more "glamorous" firms. The resentment that understandably develops from such practices can be considerably reduced by a local program of continually appraising managements' position relative to community-controlled practices.

Proximity to Atlanta. It is recommended that Carroll County manufacturers and development groups capitalize more effectively on one of the outstanding assets of the area -- proximity to Atlanta. Atlanta is considered by some to be a competitor for new industry. To those with skill and imagination, however, the nearness to Atlanta can be exploited as one of the county's most valuable locational features. Atlanta is close enough to allow Carroll County manufacturers the convenient use of its extensive warehousing, distribution, transportation and financial services, while retaining the many advantages of a small town location. Studies should focus upon the component needs of major Atlanta industries and consumer goods for the growing population.

Satellite Operations. It is recommended that further studies be undertaken to determine the feasibility of establishing manufacturing operations satellite to the existing industrial complex. The apparel, textile, metalworking and food industries appear most promising in this respect due to the volume of materials consumed. Such studies should not be limited to the requirements and products of Carroll County firms, but should include the west Georgia and east Alabama areas.

Summary of Findings and Conclusions

Carroll County's Industrial Setting. Carroll County is one of a group of six western counties in Georgia which are primarily textile-apparel oriented. In these six counties -- Carroll, Coweta, Douglas, Haralson, Heard and Paulding -- over 60% of the total manufacturing work force is employed by these industries. Most of the textile-apparel employment is concentrated in Carroll, Coweta and Haralson counties, while Carroll and Coweta employ virtually all of the metalworking group. Carroll County is the leading employer in all of the remaining industrial classifications, except in the manufacture of concrete products and asphalt products, both made in Douglas County.

Carroll County and Coweta County are the industrial leaders in the six-county west Georgia group. Even though Coweta County's total manufacturing employment trails Carroll's, its metalworking employment is over 70% greater than that of Carroll County. Coweta County appears to be gearing its economic future in large part to the higher-skilled, higher-wage jobs found in the metalworking industries -- but apparently at the expense of other jobs in other industries.

It is in the creation of new jobs -- perhaps the most significant measure of industrial growth -- that Carroll County is the unchallenged leader in the six-county group. From 1957 through 1962, Carroll County created over 1,800 new jobs in the food, textile-apparel, rubber and leather, and metalworking industries. This growth was not great enough, however, to eliminate the unemployment problem which has plagued the county for a number of years. It is obvious that Carroll County must intensify its expansion efforts if it is to provide jobs for its young people and if it is to retain its industrial influence in the west Georgia economy.

Geographical and Industrial Distribution of Manufacturers. The 66 manufacturers in Carroll County provide employment for 5,654 industrial workers. More than 90% of the firms and 87% of the jobs are located in Carrollton,

Bowdon and Villa Rica. Carrollton is the center of industrial activity with over 59% of the firms and 41.5% of the employment. Textiles and apparel dominate the manufacturing complex, employing over 60% of Carroll County industrial workers and accounting for almost 41% of the manufacturing firms.

Metalworking, a relatively new industry to Carroll County, now ranks third in number of employees and has accounted for 44% of the manufacturing employment increase during the past five years. The second largest employer in the county is in this industry. The food industry ranks next to textiles in number of firms with 12 and is the fifth largest industrial employer. Tables 1 and 2 in Appendix 2 summarize the geographical and industrial distribution of Carroll County manufacturers.

Diversity of Products Manufactured. Thirteen of the 21 major manufacturing groups identified by the Standard Industrial Classification are represented in Carroll County. This is rather unusual for a non-urban Georgia county that has not yet begun to fully develop its industrial potential. Although apparel and textiles are still dominant and several industries are not strongly represented, the presence of such a variety of industry in the county is indicative of the adaptability of the labor in the area and the broad appeal of the industrial climate. More than 65 products and product groups have been identified in the county. A complete list of the products manufactured in Carroll County is given in Table 3, Appendix 2.

Origin of Manufacturing Firms. More than three-fourths of the manufacturing firms in Carroll County were developed locally. (See Table 4, Appendix 2.) This is a clear reflection of the energy and ingenuity of local entrepreneurs. Some of the more successful companies, including a few which require a very high degree of technological and managerial talent to operate in intensely competitive markets, were conceived, promoted and built by natives of the area. Unfortunately, this initial aggressiveness is not always evident in the continuing operations of some of the firms. Of those firms not developed locally, eight are branches of Georgia-based companies, and seven are either branches of national concerns or were formed outside of Carroll County.

Manufacturing Employment by Industry and Sex. Carroll County's manufacturing structure is characterized by an unusually low ratio of male to female employment -- 1.15 to 1. Almost as many women (2,633) hold industrial jobs as men (3,021). This is a result of the dominating influence of two industries

that are primarily employers of women -- apparel and textiles. These two industries provide jobs for only a third of the male industrial employees, while employing 86% of the female industrial employees.

Of the counties contiguous to Carroll, only Haralson had a lower ratio of male to female industrial employment in 1960 -- 1.07 to 1. This was due to the concentration of apparel and textile firms in Bremen, Haralson's principal city. Ratios in other counties include Douglas, 3 to 1; Paulding, 2.4 to 1; Coweta, 2.4 to 1; and Heard, 1.8 to 1. The ratio for the state in 1960 was slightly over 2 to 1. The metalworking firms are the largest employers of males in Carroll County. Table 5, in Appendix 2, presents a complete breakdown of manufacturing employment in Carroll County by industry and sex.

Manufacturing Employment by Type of Job. The general nature of the state of industrial technology in Carroll County is revealed by the fact that, out of a total industrial work force of 5,654, only 78 (1.4%) can be classified as technical or professional. This category includes engineers, technicians and scientists, but excludes maintenance personnel and professional managers. Firms in the metalworking industry employ slightly less than 16% of the county's total industrial work force but account for more than 50% of the technical and professional employees. Production employees make up over 90% of the total manufacturing work force in Carroll County. An analysis of manufacturing employment by type of job is given in Table 6, Appendix 2.

Wage Rates and Fringe Benefits. Available statistics indicate that the average hourly wage received by Carroll County production employees is somewhat less than the state average. The weighted state average is influenced by the highly industrialized urban centers where, in general, a greater proportion of high-wage industries are located. Wages in Carroll County probably compare favorably with other counties throughout the state that have similar industrial structures. The same general analysis holds for fringe benefits offered by Carroll County manufacturers, although the number of firms offering paid vacations and retirement plans appears to be abnormally low. Tables 7 and 8 in Appendix 2 summarize selected wage rates by job type and fringe benefit practices of Carroll County manufacturers.

Union Representation. There is no union representation in any of the manufacturing operations in Carroll County. This is somewhat unusual for an area so close to a large metropolitan area like Atlanta. Although all previous

attempts at unionization have failed, it should be expected that union organization attempts will become more intense as the county develops industrially.

Quantity and Quality of Labor Supply. All firms interviewed indicated that the quantity of the Carroll County labor supply was fair or better, with the majority reporting an adequate or satisfactory supply. Opinion as to the quality of the local labor supply ranged from excellent to poor. Thirty-two of the 41 firms commenting reported quality to be adequate, good or excellent. The other nine manufacturers were not particularly pleased with the quality of labor available for their types of operations. Worker traits most often mentioned were "dependable," "good attitude," "productive" and "trainable." Information on the quantity and quality of Carroll County workers is summarized in Table 9, Appendix 2.

Vocational-Technical Training. A definite need for a vocational-technical school in Carroll County was expressed by 21 manufacturers representing 2,261 employees. Twenty-five manufacturers indicated that although technically trained employees were not presently needed in their operations, a vocational-technical school would contribute to the full economic development of the area. The remaining 21 firms expressed no opinion or were not interviewed. Training for maintenance mechanics was mentioned most frequently as the specific type of job training needed. This is especially true in the textile industry where much of the equipment dates from the turn of the century and is frequently in need of repair. Trained machinists and clerical and secretarial personnel were also mentioned as being in short supply. Table 10 in Appendix 2 lists other job training needs specified by manufacturers.

Fluctuations in Employment. Employment in Carroll County manufacturing firms remains fairly steady throughout the year, with only minor seasonal fluctuations. Few companies find it necessary to lay off a substantial portion of their workers. In some instances firms avoid layoffs, at least temporarily, by adjusting weekly hours to compensate for decreased production. Winter is generally the most slack season, affecting five industries which employ about two-thirds of the industrial labor. Fall and spring follow in that order.

Commuting Practices. The three largest industries in Carroll County, employing 76% of the total manufacturing labor, draw workers from other communities in the county and/or from surrounding counties in Georgia and Alabama. Generally, these workers are recruited from an area within a 15- to 30-mile

radius of the community in which they work. The remaining industries apparently have no trouble securing workers from their local communities. It is conservatively estimated that more than 300 Carroll County residents commute to Bremen (Haralson County) to work in the apparel manufacturing plants in that city.

Sources of Materials and Supplies. A considerable portion of the many types of raw materials and supplies consumed by Carroll County manufacturers are procured from other Georgia industries. Common to most industries in the county is the use of packaging materials -- boxes, bags, fiber drums and other paper products. Paper producers and distributors in Atlanta, Macon, Rome and Savannah supply these needs to a large extent. Many raw materials in the metalworking, leather, chemical and rubber industries are imported from outside the state. A list of materials and supplies used by Carroll County manufacturers is given in Table 11, Appendix 2.

Sources of Services. Accounting and auditing were the services most commonly reported as being obtained from agencies outside Carroll County: 27 manufacturers secure these services from firms in Atlanta, LaGrange and Newman. Ten Carroll County manufacturers bank in cities outside the county. Other out-of-county services include machine shop, design, advertising, general consulting, and tool and die work. A list of these and other services and the number of firms reporting is given in Table 12, Appendix 2.

Market Areas Served. Twenty-nine of the 66 Carroll County manufacturers consider the market for their products to be national. Included in this group are the textile, apparel, metalworking, leather and furniture industries. Twenty of the firms with national markets are in the textile and apparel industries. Five firms have some international distribution of their products. Slightly over one-third of the manufacturers serve the local market (Carroll and surrounding counties). This group is dominated by the food and kindred products industry. A tabulation of the market areas served by industry group is given in Table 13, Appendix 2.

Use of Production Capacity. Considerable unused production capacity exists in manufacturing operations in Carroll County. Of the 48 firms reporting production information, only 22 were operating at maximum capacity at the time of the survey. Ten of these firms are in the textile industry. Six textile firms, however, were operating at 50% to 74% of capacity and one at 25%

to 49% of capacity. Unused capacity was especially evident in the lumber industry and in some of the firms in the rubber, furniture and food industries. A breakdown by major industry group of the firms' estimates of their operating levels is shown in Table 14, Appendix 2.

Expansion of Facilities. Firms in the food, furniture, metalworking and some sectors of the textile industries have had several expansion programs underway during the past few years. The latest expansion in the food industry was the establishment of a frozen packaging concern as an affiliate of an existing food manufacturer. Most of the recent expansion has occurred in the metalworking industries, where four of the five firms have either built new facilities or expanded existing ones. The textile industry has found itself in an unfavorable international competitive position, which compounds its problems in attempting to finance technological updating of its capital equipment.

Barriers to Expansion. Lack of capital was mentioned most frequently as a barrier to expansion by manufacturers in Carroll County. This did not necessarily mean that the firms had tried and failed to secure capital but that they would expand if earnings or surplus permitted. Other companies cited a limited market as a barrier to expansion. In many cases, however, little or no direct effort was being made to search out new or expanded markets. The lack of trained personnel, both supervisory and technical, was reported by several company managers as a deterrent to expansion. Concern about the future supply of water was especially evident among the metalworking firms as a possible obstacle to growth.

Management Practices. A definite lack of aggressiveness characterizes many of the manufacturing firms in Carroll County. This does not apply directly to branch plants whose policies and practices are dictated from the home office. Much of the lethargy among the small firms is obscured by the venturesome spirit of the more dynamic managers in Carroll County. The members of this group are the real leaders of the industrial community, but they are a minority. The lack of aggressiveness in some of the largest industries in the county results in lost opportunities for job creation in those industries.

Community Advantages and Disadvantages. Most manufacturing managers in Carroll County were not prepared to reply to the interview question relating to specific community advantages and disadvantages. Some, unfamiliar with the industrial environment existing elsewhere, took the many advantages of

Carroll County for granted. In general, the feeling conveyed by the manufacturers was that all the elements of an ideal industrial location are found in the area. The comment most heard concerned the "good people" in the county. Other favorable comments included "good educational and religious facilities," "central market location," and "abundant supply of good quality labor."

Several areas of dissatisfaction were identified by some of the manufacturers: "unsatisfactory city administration policies" (Carrollton), "inadequate sewage facilities" (Bowdon), "increased utility rates" (Villa Rica), "poor roads" (Carrollton), and "poor rail service." A list of community advantages and disadvantages as reported by the manufacturers is given in Table 15, Appendix 2.

ANALYSIS OF INDUSTRIAL OPERATIONS

Carroll County and the West Georgia Industrial Economy

Carroll County is one of a group of six western counties in Georgia which are primarily textile-apparel oriented. In these six counties -- Carroll, Coweta, Douglas, Haralson, Heard and Paulding -- over 60% of the total manufacturing work force is employed by these industries. If this group is extended to include Polk and Bartow counties to the north and Troup County to the south, the textile-apparel figure increases to over 70%. Trailing this group is the metalworking industry, which employs 16% of the manufacturing work force. Most of the textile-apparel employment is concentrated in Carroll, Haralson and Coweta counties, while Carroll and Coweta employ virtually all of the metalworking group.

Carroll County is the leading employer in all of the remaining industrial classifications, except in the manufacture of concrete products and asphalt products, both made in Douglas County.

Carroll, Coweta and Douglas counties are developing most rapidly, although Douglas County's growth has been on a much smaller scale. Even though Douglas County gains have been relatively minor, they have been spread among many industries. It is not unreasonable to assume that the county is beginning to experience the expansion associated with Atlanta's rapid growth, which will undoubtedly play a significant role in Douglas County's future industrial strength.

Presently, however, Carroll County and Coweta County must be considered the industrial leaders in the six-county west Georgia group. Since 1957, Coweta County manufacturing employment has remained at about the same level -- slightly over 5,000. From 1957 to 1962, however, there has been a marked shift within this group, with the metalworking industry gaining while the textile-apparel group has experienced a loss. The metalworking industry now employs over 30% of Coweta's industrial work force as opposed to only 19% in 1957. Even though Coweta County's total manufacturing employment trails Carroll's, its metalworking employment is over 70% greater than that of Carroll County. Coweta County appears to be gearing its economic future in large part to the higher-skilled, higher-wage jobs found in the metalworking industries -- but apparently at the expense of other jobs in other industries.

It is in the creation of new jobs -- perhaps the most significant measure of industrial growth -- that Carroll County is the unchallenged leader in the six-county group. From 1957 through 1962, Carroll County created over 1,800 new jobs in the food, textile-apparel, rubber and leather, and metalworking industries. This growth was not great enough, however, to eliminate the unemployment problem which has plagued the county for a number of years. It is obvious that Carroll County must intensify its expansion efforts if it is to provide jobs for its young people and if it is to retain its industrial influence in the west Georgia economy.

Structure and Characteristics

Although heavily dominated by two traditionally southern low-wage industries -- apparel and textiles -- Carroll County's industrial complex is gradually being strengthened by the steady formation and growth of firms in other industries. As late as 1950 the apparel and textile firms employed 80% of the manufacturing work force in the county. By 1962 this ratio had decreased to approximately 60%. Although the relative importance of these two industries is declining, the number of workers has increased by almost 1,200 since 1950, with all of the gain occurring in the apparel industry. The textile industry lost its employment dominance with the closing of Mandeville Mills in 1953. Although some gains have been made since that time, the industry has not fully recovered its pre-1953 standing in the industrial community. Employment has remained essentially steady for the past three years.

The apparel industry, however, has made substantial annual gains in Carroll County since 1950. Four of the six apparel manufacturing firms were formed during the past 12 years. There are more than 1,900 workers in the county's apparel manufacturing concerns. These Carroll County firms exert a strong force on the economy, but the apparel industry outside the county should also be included when measuring the impact of this industry on Carroll County in terms of income generated. It is estimated that approximately 300 employees of the Sewell Manufacturing Company plants in Bremen (Haralson County) commute from Carroll County. Other apparel manufacturers in Bremen also employ many Carroll County residents: Cluett, Peabody & Company, Inc., The Hubbard Pants Company, Ray Sewell Slacks, Inc. and Warren Sewell Clothing Company.

Total employment is used in this analysis as a gauge of business activity in the apparel and textile industries. It is recognized that this approach could lead to erroneous conclusions in many industries. Due to the technological

updating of capital equipment and the implementation of more efficient production processes, some industries experience a declining work force while output remains constant or actually increases. This is not the case in the apparel and textile industries in Carroll County, however. Employment levels remain a fairly good barometer of business activity in these fields.

In terms of number of firms the textile industry easily takes the lead, claiming almost one-third of the total manufacturing establishments in the county. Eleven of the 21 firms are located in Carrollton, eight in Villa Rica and two in Whitesburg. With the exception of broad woven fabrics and floor coverings, the textile industry produces a range of products that almost completely covers the textile spectrum as defined in the Standard Industrial Classification Manual. Despite this product range, 11 of the 21 firms are in the hosiery business. Other textile products manufactured in the county include Venetian blind tapes, twisted yarns, braided cords, and continuous screen printing and finishing of drapery and upholstery materials.

An indication of the entrepreneurial spirit in the Carroll County area is the large number of firms that were originated by natives of the area. This is especially evident in the apparel and textile industries. All six apparel firms were established by natives of Carroll or contiguous counties, and operating control still remains in the area. Only four of the textile firms are controlled by interests outside Carroll County -- none of which are affiliated with regional or national mills. This differs from the situation in most Georgia counties, where the dominant apparel and textile firms are branches of large concerns. It speaks well for the initiative, drive and managerial capabilities available in the area that these relatively small, often owner-managed firms are able to prosper in these intensely competitive industries. There are few, if any, markets as fickle and unpredictable as those served by the apparel and textile industries.

Food product manufacturers -- the fourth largest employers among Carroll County industries -- are second in terms of number of operations with 12 firms. Carrollton is the center of operations; with the exception of three feed mills all food producers are located there. Most of the firms are small. Only three have more than 25 employees, and most have made no attempt to extend their areas of operation beyond the patterns established when the firms were formed. Some of the producers of consumer goods have wisely oriented their marketing efforts toward the tremendous Atlanta market. The cultivation and exploitation of this

potentially profitable and fast-growing market is this industry's best route to growth.

The grain and feed mills have suffered recently due to excess capacity in the industry. Those mills specializing in poultry feed have been operating under especially difficult conditions during recent months because of the erratic nature of the broiler market, both domestic and foreign. Some of the feed mills are changing their product mix in favor of dairy, beef and swine feed to reflect these changed market conditions.

Much of the credit for the re-structuring of the industrial base of Carroll County belongs to the metalworking industries that have located in Carrollton in recent years. Three primary metals and two fabricated metals operations have been established since 1950. Employment in these industries jumped to over 900 in 1962 from zero in 1950, the year the first plant was built.

The largest of the metalworking firms, Southwire Company, was conceived, promoted and developed by a native of the area -- further evidence of the entrepreneurial talent indigenous to the west Georgia area. Three of the other four firms were built and are being operated as branch plants. Trent Tube Company, a subsidiary of Crucible Steel Company, is the newest of Carroll County's growing metalworking group. Douglas & Lomason Company of Detroit, major producers of automobile trim, selected Carrollton as a site for a branch plant in 1955. The successful operation of this facility was no doubt a major factor in the decision to invest in an affiliate, D. & L. Plating Corporation, to provide anodizing and plating services. In operation since 1959, this firm had a major expansion in 1962.

It is fairly safe to assume that the decisions to locate the branch metalworking facilities in Carrollton were influenced to a great extent by the observance by the parent firms of the successful operation of other branch plants in the area. Carrollton and Carroll County are fortunate in this respect. Douglas & Lomason has a plant in Newnan, some 20 miles southeast of Carrollton. Haralson Metals Company, located 12 miles north of Carrollton in Bremen, is affiliated with Trent Tube Company. From these vantage points the firms were able to observe the ingredients of a healthy and financially attractive industrial climate at work. Considerably less risk was involved in the decisions to establish the manufacturing plants in Carrollton once those elements that determine prosperous industrial enterprise were seen in operation in the area.

The metalworking industry is contributing significantly to the diversification of the industrial base of Carroll County. The higher-than-average wages tend to partially offset the income-depressing effect of the typically lower wages in some of the other industries.

Three firms in the rubber and leather products industry constitute the fifth largest group of employers in Carroll County. Two of these firms came into the area from northern states with the objective of better serving the textile industry. One of these -- Textile Rubber Company of Bowdon -- has developed a wholly new product line completely unrelated to the textile industry. Genesco, Inc., has a branch operation in Carrollton that produces a line of ladies' and children's shoes.

The five firms in the furniture and fixtures industry in Carroll County employ almost 100 people and produce kitchen and utility cabinets, living room furniture, mattresses and lounges. The two largest employers were established in the fifties and have not made any radical changes either in terms of product line or pattern of distribution. One of these firms became affiliated with a large national concern a few years ago. This industry appears, for the most part, to be pretty much content with conditions as they are. With one or two exceptions, no strong efforts are being made to expand operations or to develop new markets.

Three of the four lumber companies in Carroll County are located in Carrollton and the fourth in Villa Rica. This survey was limited to the established lumber companies that are engaged in the sawing and finishing of rough lumber and timber that is supplied either by independent logging contractors or by affiliates. No attempt was made to ascertain the extent of independent logging operations because of the erratic nature of woods operations. One of the Carrollton firms has a captive market for its lumber and does not sell to the general public.

Business has, in general, been poor in recent months among the lumber and wood products firms in Carroll County. Management attributes the general decline of this industry to: (1) the importation from the West Coast of fir lumber that sells at competitive prices; (2) the increasing use of concrete, metals, asphalt and plastics as construction materials, and (3) the dwindling supply of suitable timber in the area.

The remaining Carroll County manufacturing firms collectively employ about 500 workers. Approximately 40 of these work in the two chemical firms, both of

which are branch operations of large concerns. E. F. Houghton Company established a chemical formulation plant in Carrollton in 1959 to serve the growing southeastern market for industrial chemicals. One of five branch plants in the United States, the Carrollton firm produces a broad line of chemicals, catering especially to the pulp and paper and metalworking industries. The Cotton Producers Association began operations of its Carrollton plant in 1940 and has produced a wide range of fertilizers since that time.

Carroll County supports four weekly newspapers: the Carroll County Georgian and the Times Free Press, both published in Carrollton by the Carroll Publishing Company; the Villa Rican, published in Villa Rica; and the Bowdon Bulletin, issued from Bowdon but printed by the Carroll Publishing Company in Carrollton. Thomasson Printing & Office Equipment Company in Carrollton specializes in the commercial printing trade in the area.

The four Carroll County firms in the stone, clay and glass industry are located in Carrollton. Concrete, concrete products, and marble and granite monuments are the principal products of this industry. The concrete products manufacturers rely chiefly upon building contractors and ultimate consumers within a 25- to 35-mile radius of Carrollton for their markets. The prosperity of these firms is dependent upon, and is a direct reflection of, general business conditions in the area. Business has been good in recent months and management views the immediate future with optimism.

One of the largest employers in Carroll County, the Atlanta Metallic Casket Company, employs almost 30% of Villa Rica's total industrial work force. Established in Villa Rica in 1950 as a branch operation of an Atlanta firm, it has outgrown its parent in terms of the number of persons it employs.

Employment and Labor Supply

The 5,654 persons employed by the 13 major manufacturing industries in Carroll County represented approximately 37% of the total civilian labor force in the county in 1962 -- almost double the percentage for 1940. During the same period, agricultural employment decreased from one-half of the total civilian labor force in 1940 to less than one-tenth in 1962.

Manufacturing employment gains have come primarily in the metals, apparel and food industries, while losses were experienced in the textile and lumber industries. However, the textile industry is still the second largest employer of manufacturing labor, trailing only the apparel industry. Perhaps more

significant, however, is the rise of the metalworking industry to the number three position from virtually nothing in 1950.

The increase in metalworking employment is of particular importance to the area. Of the manufacturing employment increase of almost 900 during the 1959-1962 period, 44% was in the metalworking industry. This industry includes the largest manufacturing employer in Carrollton, and five of 18 firms in the county that employ 25 or more persons are in this industry. These operations form the basis for a potential growth that could provide permanent high-wage employment for workers in the county.

Being the metalworking center has made Carrollton the largest employer of males in the county, with slightly more than half working in that city. Bowdon, the apparel-textile center of the county, employs the largest number of women. Considering only the present industry composition, it is evident that Carrollton will continue to enjoy relatively steady employment gains, while employment in Bowdon and the other smaller towns, being apparel-textile oriented, will most likely remain fairly static. This is based on the fact that apparel-textile employment has remained almost constant from 1959 through 1962, while metalworking during this period has experienced quite rapid growth.

On the whole, however, Carroll County is still overwhelmingly apparel-textile oriented. These industries employ over 60% of the manufacturing labor force. This has caused an imbalance in male-female employment, since over two-thirds of this group are women. While these two industries are the prime manufacturing employers, they provide jobs for only slightly more than one-third of the male workers. The continued growth of metalworking and other predominantly male-employing industries seems to offer the best opportunity for offsetting this imbalance while, at the same time, providing higher-skilled and higher-wage jobs.

The weighted average hourly wage for production workers in Carroll County manufacturing during 1962 was \$1.48 -- 21 cents less than the 1960-1961 average hourly wage for Georgia. Survey results reveal that only three industries, employing less than 50% of the manufacturing work force, are currently paying as much or more than the 1960-1961 Georgia average, and two of these industries are so close that they are probably not equaling the 1962 figure. The one industry that does pay better than the Georgia average employs less than 1% of the manufacturing labor. In fact, during 1962 only two industries -- apparel and lumber -- were above the Georgia average for their particular industries.

There is no union representation in any of the manufacturing operations in Carroll County. This is somewhat unusual for an area so close to a large metropolitan area like Atlanta. Although all previous attempts at unionization have failed, it should be expected that union organization attempts will become more intense as the county develops industrially.

In general, Carroll County manufacturers are relatively weak in the area of fringe benefits offered to employees. For survey purposes fringe benefits were defined to include vacations, paid holidays, bonus and profit-sharing plans, hospitalization and insurance coverage, and retirement plans. A national survey of 1,064 companies revealed that over 95% of the manufacturing companies offered vacation and insurance payments.^{1/} Of the 59 Carroll County manufacturers surveyed, only 66% reported even having a vacation policy (not always paid), and only 70% reported insurance payments, both substantially below national participation. Participation in two other benefits, paid holidays and retirement plans, is also far below national figures. Only in bonus and profit-sharing plans do Carroll County manufacturers approach the national survey figure for participation -- 12% in Carroll County against 15% nationally. Also consistent with national findings is the fact that there is no definite relationship between size of company and fringe benefits offered.

An abundant supply of labor is available in Carroll County to fill manufacturing jobs as they become available. All industry representatives agreed that the supply, in terms of number alone, was quite adequate. The problem lies in the fact that it is primarily an untrained and inexperienced labor force, not always possessing the particular skills required to satisfy available jobs. Therefore, quite a bit of difficulty is experienced by industries requiring skilled and experienced workers.

Manufacturers have a high regard for personal worker traits, most agreeing that attitude, dependability and trainability are quite good. In fact, in the opinion of a representative of one of the county's largest concerns, the greatest asset of the labor force is its "willingness and eagerness to improve itself." Up to the present, however, workers are not usually given this chance until they have acquired a job and become enrolled in some type

^{1/} Fringe Benefits -- 1959, Economic Research Department, Chamber of Commerce of the United States, 1960.

of on-the-job training. A situation thus exists where skill and experience are prerequisites for many positions but can only be acquired from training received after employment.

It is not surprising that the larger industries -- employing 83% of the manufacturing work force and requiring most of the skilled labor -- are quite eager to establish some type of vocational and technical training facilities in the county. The desirability of such facilities is further substantiated by the fact that 95% of the 1962 graduating seniors from Carrollton and Carroll County high schools agreed that such a program would be beneficial, and over half indicated a willingness to attend.

Vocational and technical training facilities would afford potential and present workers the opportunity to be trained for particular industry operations, such as sewing and woodworking, as well as for occupations common to many industries, such as machinists and mechanics. Competent clerical and secretarial personnel, presently scarce, could also be prepared under such a program. Equally important would be the training and preparation of supervisors by exposing them to accepted managerial techniques and procedures. Obviously such a program would help both parties concerned, relieving industry of costly on-the-job training and reducing the risks of hiring untrained labor, while better preparing a more productive work force.

Employment in Carroll County manufacturing firms remains fairly steady throughout the year with only minor seasonal fluctuations. Few companies find it necessary to lay off a substantial portion of their workers. In some instances firms avoid layoffs, at least temporarily, by adjusting weekly hours to compensate for decreased production. Winter is generally the most slack season, affecting five industries employing about two-thirds of the industrial labor. Fall and spring follow in that order.

The three largest industries in the county, employing 76% of the total manufacturing labor, draw workers from other communities in the county and/or from surrounding counties in Georgia and Alabama. Generally, these workers are recruited from an area within a 15- to 30-mile radius of the community in which they work. The remaining industries apparently have no trouble securing workers from their local communities.

Materials, Supplies and Services

Generally, management in each of the industries in Carroll County is satisfied with present sources of materials and supplies. Most of those who expressed dissatisfaction were concerned with their own operation rather than the industry in which they operated, and in only one instance did firms within the same industry agree on an inadequacy. This was in the chemical industry, where strong interest was expressed in securing raw materials and supplies from closer sources, preferably Georgia.

The food industry seems to be more successful than the others in securing its raw materials and supplies locally. Approximately 10,000 pounds of milk are purchased annually from Carroll and surrounding counties. Sugar and some salt are purchased from a Carrollton wholesaler for use in both dairy and meat processing operations. Finally, many of the feed and grain mill operations have found adequate local sources of hay, corn and burlap bags.

To a limited extent, the furniture and fixture industry purchases local materials. Items such as mattresses, welt cord and cotton waste are either products or by-products of local concerns. The lumber industry, which once could rely on local sources of standing timber, now finds it necessary to venture into neighboring counties to find suitable stands of timber. Bits, saws, drills, and other miscellaneous mill supplies are usually purchased locally, with some of the business shared with Bremen. The growing metalworking industry has yet to find adequate local sources of materials or supplies, although one firm attempts to make all of its supply purchases from firms either in Carrollton or the immediate area. However, it has found it necessary to go out of its way in some cases to find a local supplier. In all industries, maintenance and repair supplies are purchased locally whenever possible.

Atlanta is used considerably as a source of materials and supplies by several industries, in many instances to augment local sources. The food industry is supplied with chocolate powder, fertilizer, burlap bags, meal and hulls, and packaging supplies; cattle are also bought at auction in Atlanta. The major supplies for the furniture and fixture firms -- saws, blades, belts, sandpaper, etc. -- are purchased from Atlanta, together with a portion of the paints, thinners, lacquers, finishes, glues and packaging materials. Other lumber supplies, including plywood and shelving, round out this industry's Atlanta purchases.

Other items obtained through regional warehouses and sales offices in Atlanta include stainless steel, copper and general mill supplies for the metalworking industry. Scrap metal, primarily aluminum, and packaging supplies are other Atlanta purchases, with some of the latter provided by Macon and Rome. Textile dyes, chemicals and miscellaneous finishing materials are supplied by Atlanta distributors of national chemical firms. Both the apparel and textile industries rely quite heavily on Atlanta for packaging supplies. Atlanta paper distributors supply most of the needs of the printing industry, with one Macon firm participating to a limited extent. Some of the supplies used are inks, chemicals, offset plates, plastic bindings, stitching wire, paste and glue.

The textile, rubber and food industries obtain packaging materials from sources in Georgia. Cardboard boxes are shipped in from Rome, Macon, Savannah, Cartersville, Dallas and Cedartown. This represented the bulk of Georgia purchases by the textile industry; a small portion of the cotton yarns used by two mills were the only other purchases. For the food industry, the other Georgia-supplied items include cattle, broilers, dressed hogs, meal and hulls, feed concentrates and bottles. Georgia also supplies the apparel industry with a small portion of cotton and blended piece goods as well as cotton for the furniture operations.

The small stone and clay operations purchase all of their supplies within Georgia. They also purchase all materials, except cement, from within Georgia -- the entire quantity of over 50,000 tons per year of sand, gravel, galite and crushed granite.

Most of the raw materials to support the textile-apparel complex are purchased from neighboring states. Cotton, synthetic (mostly nylon) and elastic yarns, which represent a significant portion of the textile purchases, are obtained from the Carolinas, Tennessee and Alabama, with North Carolina providing the bulk of nylon and Alabama the bulk of cotton requirements. Cotton and blended (Dacron, rayon, worsted and woolen) piece goods, major materials of the apparel industry, are obtained from the southeastern states plus Virginia and New York. According to one estimate, approximately 80% comes from the Carolinas and Virginia. Thread and buttons, other major apparel industry items, are purchased primarily from North Carolina, Tennessee and New York. Other out-of-state purchases by these industries include a small quantity of cotton staple from Texas and South Carolina, visor board, waist bands,

shoulder pads and lining. A small amount of imported staple rayon, considered superior to the domestically produced variety, is purchased from West Germany.

The metalworking industry imports most of its major raw materials from out-of-state sources. Naturally, heavy reliance is placed on Alabama for purchases of cold-rolled and hot-rolled steel, high carbon steel, and some of the aluminums. As mentioned earlier, stainless steel and copper are obtained from one of the largest national producers through an Atlanta regional sales office. Arkansas and Texas provide great quantities of chemicals for Carroll County consumption. In many cases, firms with affiliates outside the state rely on these affiliates to establish sources of supply.

Among the outstanding non-Georgia items consumed by the food industry are livestock and feed mill supplements. These include cattle from Alabama, hogs from Alabama and Kentucky, salt from Louisiana, dry milk from Wisconsin, spices and feed additives from northern states, corn and grain from Alabama, meal and hulls from Alabama, Mississippi and Tennessee, feed minerals and pulp from Florida, paper bags from South Carolina, and packaging supplies from Florida.

Few of the materials consumed by the chemical firms are produced in Georgia, although many are distributed through Atlanta jobbers. Items such as acids and oils come from as far as Texas, West Virginia, Utah, Colorado and New Mexico. The balance of materials is purchased from surrounding states, with packaging supplies secured from Florida, South Carolina and Missouri, as well as Georgia.

The remaining out-of-state purchases by various industries represent significant portions of total industry consumption. Newsprint is purchased almost entirely from Tennessee; timber and lumber from Alabama, the Carolinas and Virginia; and latex, rubber (isoprene, mineral and reclaimed), pigments and anti-oxidants from Georgia distributors representing out-of-state companies. Small amounts of upholstery and mattress material are secured from North Carolina, Tennessee and California, mattress bags from Tennessee, springs and burlap from California, and packaging materials from Tennessee.

The only local services which seem to be adequate are banking and some types of accounting, with most auditing and specialized accounting services performed by Atlanta firms. Tool and die work is done by northern firms, and most equipment maintenance and repair is done in neighboring cities such as Atlanta and Rome. Architecture, advertising, engineering, consulting and design services are generally provided by non-county companies.

While generally in agreement on the adequacy of present sources of materials and supplies, some firms did express a desire for closer suppliers of the following: waist bands, shoulder pads, lining materials, cotton yarn (a Carroll County producer went out of business in 1953), high carbon steel, livestock, grains and concentrates, and chemicals.

Sales and Distribution

An unusually large number of Carroll County's industrial products serve national markets. Firms in almost every industry reported national and, in some cases, international distribution of their products. Heavy reliance is placed upon jobbers and resident sales agents for product distribution. Only a few firms maintain a sales force of any size, and none have territories that extend beyond the southeastern states.

The widest distribution is achieved by the apparel, textile, metalworking, rubber and chemical industries. The apparel firms typically distribute through jobbers or direct to large retail stores through the company sales force. The bulk of the sales is absorbed by distributors in the eastern part of the country, but eventually reaches consumers throughout the U. S. through national chain and variety stores. An estimated \$3 to \$5 million annual sales volume is generated by the Carroll County apparel industry.

As with the apparel manufacturers, the textile industry generally considers its market to be national. The channels of distribution are essentially the same as those used by the apparel industry -- resident sales agents or representatives in the larger cities. The city most named as agent headquarters was New York. Again like the apparel industry, much of the output is sold through large chain stores under their own brand names. Several of the Villa Rica hosiery mills, for example, do not perform the finishing operations but sell to other mills -- both within and outside the state -- that finish, package and distribute the product under several different brand names.

The dyeing and finishing firms operate as converters. Without taking title to the goods, these firms print the fabrics and return them to the owners for distribution.

At least three of the five metalworking firms in Carrollton had their markets more or less established before erecting their plants. Being branch operations their production and distribution patterns are dictated by the parent firms, hence there is no need for sales forces operating out of the local

plants. The markets for these branch firms are national, with some indirect exporting. Two of these firms supply the automobile industry exclusively. Sound expansion programs, coupled with a sharp increase in auto output over recent years, have helped these firms avoid the effects of seasonal fluctuations common to the industry. One local metalworking firm depends generally upon the construction industry for its sales but has avoided the seasonality factor by developing a broad product mix and by an almost continuous program of expansion.

With one exception the Carroll County rubber and chemical product manufacturers are branch operations of large concerns. These rely heavily upon the distribution channels and sales force of their parent companies. In addition to the marketing efforts of the home office in a northern city, sales of the Carrollton plant of one chemical company receive considerable stimulus because the southern sales manager is headquartered at the local plant. Since this firm carries a well diversified line of industrial chemicals, seasonal fluctuations applicable to its customers are not reflected in the firm's overall sales level.

In the furniture and fixture industry only one of the five firms serves a national market, selling direct to chain retailers and, through representatives, to small furniture stores carrying moderately priced lines. The smaller cabinet manufacturers rely chiefly on commission salesmen for the creation of their markets, making little or no attempt to enlarge or strengthen their markets through personal selling efforts. Two firms operate on a modified job-shop basis, producing little or no inventory, thus minimizing the need for working capital. During the survey period most of the firms were operating at approximately 50% of productive capacity. This reduced rate was a result of general business conditions in the industry rather than a seasonal trend, for the summer months are generally the heavier ones. This is especially true of the kitchen and utility cabinet shops that depend upon the seasonal home construction industry to absorb much of their output.

Per firm annual sales volume in the food industry ranges from just over \$50,000 to approximately \$2,000,000. The smaller feed and grain mills produce at the lower level, while the larger volumes are found among the meat processing firms. Survey figures show that approximately 80 tons of meat and meat products are processed weekly in Carroll County; this represents only 75% of the maximum potential output. With one exception the meat processors generally

regard their market areas as consisting roughly of those counties contiguous to Carroll, although one producer ranges north to Rome and south to Columbus. Some producers have chosen to concentrate on the expanding Atlanta market, selling chiefly to large retail chain grocery stores in the area.

Approximately 80% of the output of the feed and grain mills supplies the contract poultry farmers in the area. Unstable conditions in the poultry industry have caused at least one feed producer to severely cut production. This producer's present plans are to leave the industry.

The Carroll County lumber processors have not been able to penetrate the Atlanta area market despite the phenomenal population growth in recent years and the accompanying home construction boom. Reports indicate that better than 90% of the output goes to points west of Carroll County. One firm found a market for much of its output in Ohio, where it is used as decking for railway cars.

The increased use of metals, plastics, pre-stressed concrete panels, and various types of wallboard in the construction industry is beginning to be felt in the lumber industry. There is little reason, at least on the surface, why this trend should not continue. Lumber producers must concentrate on the development of new uses and new markets for their product if they are to overcome the depressed conditions which now threaten them.

The commercial printing firms in Carroll County serve the business community in and around the county, with manufacturing concerns constituting the largest single customer group. Annual sales exceed \$250,000 in the stone, clay and glass industry, with primary selling efforts focused on the area within a 50-mile radius of Carrollton. Volume varies directly with the construction activity in this area.

INDUSTRY PROFILES

This section presents a profile by Standard Industrial Classification (SIC) of the manufacturing operations in Carroll County. With the exceptions noted below, each industry group represented in the county is considered in terms of its composition and characteristics, employment practices and labor supply experiences, sources of materials, supplies and services, production facilities, sales and distribution patterns, and growth trends. In those industries where it is significant, consideration is also given to the adequacy of physical facilities and the availability of utility services.

The industry profiles are arranged in order of total employment in Carroll County, with the exception of the two one-firm industry groups which are considered last. Because of the close similarity of operations in the metalworking field, two industrial classifications -- Primary Metal Industries (SIC 33) and Fabricated Metal Products (SIC 34) -- are combined and analyzed as a single industrial group. Two other classifications -- Leather and Leather Products (SIC 31) and Miscellaneous Manufacturing Industries (SIC 39) -- are represented by only one firm each in Carroll County. To avoid disclosure of information which was given in confidence, these one-firm industry groups are not discussed in detail in this report.

Apparel and Related Products (SIC 23)

Industry Composition and Characteristics

None of the five apparel manufacturers in Carroll County have facilities in Carrollton. Two are situated in Bowdon and the other three are in Villa Rica, Temple and Mount Zion. All are incorporated and only two were established prior to 1953, both in 1933. In general, they were originated by men native to the Carroll County area. One was established at its location in part to stimulate economic activity in that area. Two are part of or have affiliated interests, both with headquarters in Bremen, Georgia.

Products manufactured include suits, slacks, vests, sport coats, sport shirts, caps and hats.

The three firms surveyed each use over 25,000 square feet of floor space for their operations and have a combined total of 455 sewing machines, 70 clothes pressers, and miscellaneous cutting and die-cutting machinery.

All three are situated on expandable sites with adequate utilities provided and facilities for trucking only. One of the two firms presently using septic tanks for waste disposal expressed a strong need for sewage facilities.

Employment and Labor Supply

As could be expected, women comprise a large portion of the labor used in the apparel industry. There are over 1,700 persons employed by the five Carroll County apparel manufacturers and approximately 75% are women, employed primarily as sewing machine operators. In general, supervisory, administrative, maintenance and mechanical duties are performed by men, as well as some cutting and pressing duties. Women do most of the clerical and secretarial work. Most of the labor is drawn from within a 15- to 25-mile radius of the plant in which they work; many Bowdon employees commute from Alabama.

Seasonal employment fluctuations are apparently slight, with the only heavy lay-off occurring when a major item is temporarily out of production. Vests, for example, are not produced from December through March.

Wages range from \$1.15 per hour to \$2.10 per hour and in some instances are dependent on incentive earnings. Hourly wages for sewers range from \$1.60 to \$1.70, while pressers earn \$1.75 to \$2.10 per hour. Miscellaneous workers, such as mechanics and maintenance men, earn in the neighborhood of \$1.75 per hour. Fringe benefits for all firms include hospitalization and insurance (company participation ranging from 20% to 100%) and one to two weeks' vacation. Individual firms include other benefits, such as paid holidays, profit sharing and coffee breaks.

There is no union representation in the apparel industry in Carroll County, although there are attempts presently being made to organize this work force.

Although many girls are seeking more glamorous jobs, there is still an adequate supply of good quality labor available. However, a vocational training school would be quite helpful in preparing both sewers and maintenance personnel, while at the same time relieving firms of expensive on-the-job training programs. In this respect, firms expressed a willingness to participate in such a program if established. They did not, however, appear too interested in a possible co-op program with West Georgia College except for preparing some students in administrative techniques and procedures.

Materials, Supplies and Services

Since one of the firms not surveyed is the largest apparel manufacturer in Carroll County, it is difficult to estimate the quantity of materials and

supplies consumed. Total employment for the three firms for which data are available is just half that of this one concern, so even an estimate may be quite inaccurate.

Cotton piece goods and blended piece goods (Dacron, rayon, worsted, woollens) are naturally the largest single items purchased by this industry. It would probably be safe to assume that well over one million yards are consumed yearly, perhaps closer to two million. Officials of one firm estimated that approximately 80% of their purchases of this item come from the Carolinas and Virginia, with Georgia, Alabama and New York providing the remaining portion. Thread and buttons are also major items, purchased primarily from North Carolina, Tennessee and New York. One of the firms surveyed reported over \$5,000 per year in thread purchases, while another firm reported button parts purchases approaching 5,000 gross per year. Visor board for caps is another large volume item, purchased from either Austell, Georgia, or Massachusetts. Waist bands, shoulder pads, and body and pocket lining make up the bulk of the remaining materials consumed. Corrugated boxes for packing represent almost the total supply purchases by the industry and represent the only volume item consumed. Over \$12,000 per year is spent on such purchases by one concern, which buys from either the Atlanta Paper Company or Gaylord Container Corporation.

All firms use their local bank to some extent, while relying on Atlanta for additional banking, accounting, auditing and legal services. An Ohio consulting engineering firm is being used by one firm to study its present administrative and production procedures.

Local sources of materials, supplies and services are apparently adequate, although one firm did express a desire for closer suppliers of waist bands, shoulder pads and lining materials. However, it is doubtful whether there exists sufficient volume to warrant the establishment of such facilities. More competition among existing suppliers, as desired by one firm, might have some effect on the final total cost of obtaining materials and supplies.

Production

All firms operate a standard 40-hour week (five eight-hour days) with some overtime, usually for cutting operators to prepare material for the coming week's scheduled output. Second and third shifts have not proved desirable since they tend to increase quality control costs. Presently, all plants are operating at maximum potential output for the hours worked. Since each

of the three firms surveyed expressed output in different units and since no information is available for the other two, total apparel output cannot be estimated. At best it can only be said that the figure is quite substantial.

Clippings represent the bulk of waste material and are usually sold to local dealers. In one instance the dealer exports clippings to Italy.

Sales and Distribution

Limited data make it necessary to estimate annual sales volume of the apparel industry in Carroll County, but it probably approaches a range of \$3 million to \$5 million. Sales are dependent on seasonal styles and there is usually a three to six month lead time in sales. They remain generally stable except for some individual items, however, as pointed out previously. The period from January to June accounts for 60% of the annual dollar sales volume in one case, while November through March was mentioned as the maximum production period for another firm.

Distribution is through jobbers or direct to retail stores, either private or chain, by way of a company sales force. The industry serves a national market, with the bulk going to the southeastern or eastern states. In only one instance was a prime contractor in Georgia mentioned, and this was the only mention of any special customers by firms in the industry.

Shipments are almost entirely made by truck, usually the local franchise, with only a token amount shipped by railway express. All firms have their own storage facilities.

Industry Growth Trends

The apparel industry's development is to a great extent dependent on the changing dress habits of the public. Currently there is a trend from semi-formal toward more casual dress. This naturally dictates style changes and, because of the lead time involved, companies are required to keep up with current trends to prevent large build-ups of "old style" inventory.

No major problems or obstacles to growth were noted by the firms surveyed, and none indicated that they had considered expansion plans. They are apparently content to keep pace with general industry growth and development.

Two firms expressed complete satisfaction with the communities in which they are situated -- one because of the town's location and the other because of the high quality of labor available. Sewage was desired by one firm.

Textile Mill Products (SIC 22)

Industry Composition and Characteristics

The textile industry in Carroll County is composed of the following number and types of mills in the locations indicated:

	<u>Carrollton</u>	<u>Villa Rica</u>	<u>Whitesburg</u>	<u>Total</u>
Narrow Fabrics	2		1	3
Knitting Mills	4	7		11
Dyeing and Finishing	2			2
Yarn and Thread Mills	1	1	1	3
Miscellaneous Textile Goods	<u>2</u>	<u>—</u>	<u>—</u>	<u>2</u>
	11	8	2	21

With the exception of broad woven fabrics and floor covering, the textile industry in Carroll County produces a range of products that almost completely covers the textile spectrum as defined in the Standard Industrial Classification Manual. There is an imbalance, however, in that over half -- 11 out of 21 -- of the textile mills in the county are engaged in the manufacture of hosiery. The hosiery manufacturers are concentrated in the northeastern section of the county where, in Villa Rica, seven of the eight textile mills manufacture hosiery. In Carrollton four of the 11 textile mills are in the hosiery business.

Other textile products manufactured in Carroll County include Venetian blind tapes, twisted yarns, braided cords, and continuous screen printing and finishing of drapery and upholstery materials. Facilities for custom hand printing of speciality items and for the design and manufacture of screens for the printing of plastic products are provided by one of the firms in the dyeing and finishing category of the textile industry.

All but five of the textile firms have incorporated. These five, four of which are located in Villa Rica, are all manufacturers of hosiery and allied products and have retained the proprietorship form of organization. None of the textile firms in the county are affiliated with large national concerns; only four are controlled by interests outside Carroll County. A number of these firms have changed ownership several times. This is particularly true of the hosiery mills and the yarn mills, notably in Villa Rica and Whitesburg. A majority of the firms in this industry were organized by natives of the area, for the most part without the help of outside capital.

Physical Facilities and Services

Virtually all the firms in the textile industry in Carroll County are housed in buildings that were either constructed for a firm in a different industry or were used by other firms in the same industry. With few exceptions, one or more firms occupied the buildings prior to the present occupants. Consequently the physical facilities in the industry are outmoded and, if not in a state of disrepair, are technologically in arrears and prevent the most efficient operation of the plants. Textile equipment is, in general, not subject to rapid obsolescence; much publicity has been given to the age of U. S. textile machinery relative to European and Japanese equipment. But it appears that the Carroll County textile industry is burdened with machinery that is inefficient even when measured against the aged U. S. standard. With such low productivity it is doubtful if the industry could survive if the wages were not proportionately lower than the U. S. average.

Employment and Labor Supply

The following number of workers are employed in the various segments of the textile industry in the locations indicated:

	<u>Carrollton</u>	<u>Villa Rica</u>	<u>Whitesburg</u>	<u>Total</u>
Narrow Fabrics	30		110	140
Knitting Mills	390	607		997
Dyeing and Finishing	169			169
Yarn and Thread Mills	80	60	94	234
Miscellaneous Textile Goods	<u>88</u>	<u>—</u>	<u>—</u>	<u>88</u>
	757	667	204	1,628

Of the 1,628 workers employed in the textile industry in Carroll County, well over 50% are women. The knitting mills account for almost 1,000 of the total textile employment, indicating the imbalance within the textile industry. The Villa Rica knitting mills employ over two-thirds of the county's employment in this category. The yarn and thread mills are the next largest employers in the textile industry, followed by the dyeing and finishing mills and the narrow fabric mills.

Almost without exception the mill managers are concerned with the recruitment of dependable workers who will regard their jobs as permanent. Older workers are, in general, preferred over the young ones. The young people reportedly have poor attitudes toward their jobs in the textile industry. The

resultant high turnover is expensive for the firm and forces a preference for older employees. Many of the firms as a matter of policy do not consider employing anyone under 30 years of age. For example, one mill with total employment of 94 has only four employees under 25 years of age. The average age in this mill is 48.

Management is well aware of the inevitable consequences should this trend continue. Once the supply of trained older workers is exhausted, the industry will be forced to alleviate those conditions that now make textile jobs undesirable for young workers -- low wages and poor working conditions. Many perceptive managers have stated that the major problem their industry faces, or will soon face, is the procurement and retention of labor. Ambitious young people with at least high school education must be attracted to this industry to provide spark and imagination that characterize progressive industries. Failure to do this will place the industry's ability to survive in jeopardy.

Except for machinists and other maintenance personnel and administrative employees, most managers feel that vocational training has little application to this industry. In almost every case management feels that on-the-job training is superior to any training an employee can receive in a vocational program. The outstanding exception to this general opinion is in the dyeing and finishing mills, where higher initial skill levels are required for the coloring, engraving and printing operations. Management strongly recommends vocational training in these areas. All mills were in agreement on the vital need for trained mechanics and machinists to service the dilapidated equipment, which requires constant and skilled attention to insure that profitable operating levels are maintained.

Wages in the textile industry in Carroll County tend to hover just above the minimum wage -- \$1.15 per hour. This is particularly true in the knitting mills. In general, average hourly rates much above this figure are based on some kind of piece-rate system. With rare exceptions, the top hourly rate paid production workers in the textile industry does not exceed \$1.35. The reported range for machinists and other maintenance employees, based on a much smaller sample, is from \$1.60 to \$2.25 per hour. The major job titles in the textile industry include knitting machine operators, looper machine operators, seamers, finishers and inspectors.

Fringe benefits are weak in the industry. The most prevalent form of fringe benefit is a group insurance program, and rarely does the firm underwrite

more than 50% of the costs involved. One-third of the firms provide paid vacations -- one week in most cases. Paid holidays are practically non-existent; only two firms have established policies in this area. Bonus plans are in effect in three of the firms.

No workers in this industry are represented by a union.

Materials, Supplies and Services

The overwhelming dominance of hosiery mills in the Carroll County textile industry is reflected in the types of raw materials consumed. Cotton, synthetic (mostly nylon) and elastic yarns are the principal raw materials of the hosiery mills and represent a significant portion of the raw materials required by the other mills in the textile industry. Heavy reliance is placed on firms in neighboring states for these yarns. North and South Carolina, Tennessee and Alabama are substantial suppliers, especially North Carolina for the nylon and Alabama for the cotton. Only two mills reported Georgia firms as a source of raw materials (cotton yarn).

West German staple rayon, considered far superior to the domestic variety, is mixed with domestic rayon by the yarn mills to produce a better quality rayon yarn. The yarn mills find a market for their product in the north Georgia carpet industry. A relatively small quantity of cotton staple is used in the Carroll County textile industry; the sources given for this item were Texas and South Carolina.

The dyes, chemicals and miscellaneous finishing materials are supplied by Atlanta distributors of national chemical firms. Miscellaneous mill supplies for equipment maintenance and repair are purchased locally, except for specialized parts that must be obtained through distributors in Atlanta or direct from the manufacturer of the equipment.

The largest supply item in terms of dollar value is the packaging material. Georgia firms are extremely well represented on the list of suppliers of this item. Cardboard boxes, the largest single item, are shipped into the county from Rome, Macon, Savannah, Cartersville, Dallas, Cedartown and Atlanta. In very few cases did a firm import cartons and/or corrugated boxes from sources outside the state.

Several firms indicated the need for a machine shop in Villa Rica to handle equipment modification and repair requirements. Most of the millwright work is now done by a shop in Athens that specializes in textile machinery.

Management is, in general, satisfied with present sources of materials and supplies. The single exception is the source of cotton yarn. The only Carroll County producer of cotton yarn went out of business in 1953, and the mills that enjoyed the convenience of a local supplier of this item miss the lost economic advantages.

Production

During the interview period (April through June, 1962), every textile mill except one worked more than one shift per day. Slightly over half the mills operated on a three-shift basis. This was, however, the start of the busy season, especially in the hosiery mills, and should not be regarded as typical. During the winter slack season the typical mill reduces the hours worked so that a fairly steady work force is maintained despite the seasonal production schedule. All mills were operating a five-day week with the exception of one six-day operation.

The knitting mills, hosiery being the principal product, were producing during the survey period at a combined rate of over 80,000 dozen pair of socks per week. The combined maximum output of these mills is approximately 100,000 dozen pair per week. Although it is less meaningful to generalize regarding the output of the other mills, it is safe to estimate that the yarn and thread mills and the braid mills produce in excess of 150,000 pounds per week. It is not possible to discuss the output of the remaining firms without disclosing information relating to single firms.

Most firms, especially yarn consumers, reported sales of waste to a local waste broker. No estimates were obtained as to the value of this waste or its ultimate use.

Sales and Distribution

The typical Carroll County textile manufacturer distributes his product through sales agents stationed in the larger U. S. cities. The city most named as agent headquarters was New York. The market area is, in general, considered to be national, with limited export in some cases. Only one hosiery mill reported that sales were made direct to the retailer. Several hosiery mills in the county do not perform the finishing operations but sell to other hosiery mills in or outside the county that finish, package and distribute the product. Most firms believe their market to be concentrated in the eastern U. S., probably because the sales agents and headquarters for the purchasing firms are located in New York. The products are eventually sold throughout

the U. S. in the chain store outlets of firms like F. W. Woolworth and J. C. Penney Company.

With few exceptions the other textile mills have the same distribution pattern as do the hosiery mills. The dyeing and finishing firms, however, are different in that they operate as converters. Never taking title to the products, these firms print and/or dye the fabrics and return them to the owners for distribution.

Shipment of the products is almost exclusively by motor freight due to reported poor rail service.

Industry Growth Trends

It is no secret that textile manufacturers in the U. S. have been, and are now, caught in a cost-price squeeze that has forced the industry to cut operating costs drastically in order to endure. Despite current near-capacity operations, the Carroll County textile industry is no exception to this general affliction.

The industry in Carroll County survives the increasing competition from abroad due principally to (1) low wage payments to employees, and (2) the practice of allowing machinery to become obsolete with no attempt to replace technologically inferior equipment on the grounds that it still works. This is, of course, a diminishing advantage, becoming a disadvantage when the gain in wage differential is overcome by the loss in machinery productivity. Should the industry be forced to compete without the currently prevailing (3) protective tariffs, the structure of the industry would almost assuredly be changed to one of large integrated manufacturing facilities.

There has been almost no recent growth in the textile industry in Carroll County. To the contrary, one large firm closed in Carrollton in 1953, and a much smaller one followed suit in 1959. Many of the firms have changed ownership several times in recent years.

One exception to the general state of stagnation in this industry is in the dyeing and finishing concerns. The two mills in this category, both located in Carrollton, are relative newcomers to the county -- established in 1954 and 1959 -- and are doing a brisk business in this field. The obstacles to growth in these firms do not include a lack of demand at acceptable prices, which is itself unusual in the textile industry.

Few firms have made any recent attempt at modernization of facilities, and even fewer have plans for expansion, diversification or modernization.

The general impression presented is one of lethargy; the few managers imbued with the dynamic qualities necessary for firm innovation and growth stand out in sharp contrast.

Primary and Fabricated Metals (SIC 33-34)

Industry Composition and Characteristics

This analysis excludes the newest, and potentially one of the largest, additions to the burgeoning metalworking complex in Carrollton. At the time of the survey this firm had not gone into production. Its contribution to Carroll County's economy cannot be adequately appraised until full production is achieved.

The four firms in this industry (excluding the new firm mentioned above) produce a wide range of metal products that are distributed nationwide: automobile trim and accessories, plating (zinc, cadmium and chrome) of automobile trim and other products, hardware fittings and custom castings, and electrical wire and cable of almost any size encased in various types of sheathing. All four of these firms have incorporated; two of them, including the largest employer, have no affiliates. One of the remaining two was established as a branch plant of a northern concern, while the other has at least 50% ownership interest in Georgia.

The largest of these firms, and the first to be established, is completely home-grown -- conceived, promoted, built and operated by local people. Another firm moved to Carrollton from a large metropolitan center in 1953 because of the abundance of labor in Carroll County. Although no direct statements were made by two of the firms regarding their reasons for locating in Carrollton, a strong motive was fairly obvious: to find a more favorable labor climate.

Physical Facilities and Services

In almost every case the buildings were built specifically for the firm; hence, they are only a few years old and are completely adequate. The equipment is technologically equal to that found anywhere and more advanced than most. Some of the firms have developed, or are developing, new production processes that, hopefully, will provide additional competitive advantages on particular products. A progressive spirit toward product and equipment innovation is characteristic of the management in this industry.

There are no complaints about the sewage system -- some untreated acid waste is flushed into the city sewage system -- and the water supply is

considered adequate at present. Some managers feel, however, that the water supply could pose a serious problem in the future. The metals industries use great quantities of water. Although there are no immediate problems, if the industry expands in the area as it has for the past few years, new sources of water must be developed.

All the firms have rail sidings on their property and are convenient to either state or federal highways for motor freight service. Two were very displeased over the condition of the main road from their plants to Carrollton. Work is now proceeding on the reconstruction of this road.

Employment and Labor Supply

The approximately 850 workers in the metals industry (excluding an estimate for the newest firm) have enjoyed full year-round employment for the past year, and seasonal layoffs have been relatively rare for several years. Part of this trend can be explained by a look at the customers the firms serve. Those in the automotive parts business are unquestionably in a seasonal industry, but the automobile manufacturers have had, and are having, an unusually good year. The good fortune of the Carroll County parts manufacturers is, of course, tied directly to that of the car producers.

Also, since all these firms are relatively new, they have not reached "normal" operating levels, and consequently have not been subjected to seasonal fluctuations as have more mature manufacturers. Once the companies have had sufficient time to develop their full potential in the area, seasonal fluctuations will be more easily detected.

The average wage for all production workers is roughly \$1.70 per hour, considerably ahead of wages received by workers in other industries in the county. Wages of the highly skilled employees -- tool and die workers, machinists -- range up to \$3.00 per hour.

One manager reported that fringe benefits cost his company 12¢ per hour. Such benefits are much more liberal here than in other local industries. All except one company give a one-week vacation with pay after one year, two weeks after five years. All firms participate in liberal insurance programs -- life and hospitalization. Five paid holidays per year are standard in this industry. Some form of retirement plan is in effect at three of the four firms. At least one company has an educational program in effect whereby the employee is reimbursed for tuition at a rate dependent upon his final grade in the course.

Labor unions are nonexistent in this industry, as is true of all Carroll County manufacturers. Attempts have been made to organize three of the firms, ending in failure in each case. Several National Labor Relations Board elections have been held, with the labor unions losing by very narrow margins in two of these elections. No union activity has taken place for over a year now.

Management is generally well satisfied with the quality of the local labor force. In some cases the workers are highly praised for their trainability, productivity, dependability and attitude toward their jobs. Other managers report that the local workers are no different in these characteristics than those workers in other sections of the country. In one case the local workers were criticized for their poor characteristics. In those firms that have had experience with labor unions, it is easily deduced from their guarded comments that the lack of a union in Carrollton is reason enough in itself for better management-labor relations and increased productivity. Aside from this factor, it is safe to generalize that most employers value very highly those attributes of dependability, job attitude and eagerness to learn that are not so pronounced in the more mature industrial regions.

None of the companies have had difficulty in recruiting numbers of workers, but there are few to be found with previously acquired skills. This comes as no surprise to the firms -- they knew the low skill and educational levels before they located there -- and their statements were not intended as complaints. As a matter of fact, most employers would rather train their own production workers, but they were very emphatic in their statement of a need for vocational training for tool and die workers, machinists, mechanics and other highly skilled crafts. Also, some firms expressed concern over the lack of young men with suitable education and experience that have middle and upper management potential.

The educational level is relatively low. Some workers who have extremely good work records cannot read or write. Most firms have abandoned any attempt to establish minimum education requirements before considering a worker for employment.

An attempt is made to recruit workers from the Carrollton area, but in some cases workers commute from Alabama as well as from contiguous counties. The great majority of employees live within a 15- to 20-mile radius of Carrollton, however.

Only one firm expressed interest in a co-op program with West Georgia College. Should more of the administrative activities be transferred to Carrollton plants, local management foresees an opportunity for developing such a program.

Materials, Supplies and Services

The major raw materials consumed in the metals industry are imported from out-of-state sources. Cold-rolled and hot-rolled steel, high carbon steel, and some of the aluminums are obtained from various places in Alabama, notably Birmingham, Gadsden and Lister Hill. Stainless steel and copper come from one of the nation's largest producers through an Atlanta regional sales office. Some scrap aluminum is supplied by an Atlanta scrap dealer.

Great quantities of chemicals are imported from suppliers in Arkansas and Tennessee. General mill supplies are purchased through large Atlanta supply houses. In some cases it is evident that efforts have been and are being made to locate local sources of materials and supplies. One firm purchases all its supplies from firms either in Carrollton or in the immediate area and goes out of its way in some cases to find a local supplier. In most cases, however, the firms with affiliates outside the state rely on those affiliates (usually parent companies) to establish sources of supply. Packaging supplies -- cardboard boxes usually -- are purchased from firms in Atlanta, Macon and Rome.

With a single exception management in this industry is satisfied with present sources of materials and supplies. One manufacturer feels that the growing market for high carbon steel in the Carrollton area would support a mill.

Production

Two of the four firms are classified as primary metals industries, and both of these work almost exclusively with nonferrous metals. The smaller of the two is primarily engaged in manufacturing aluminum castings, operating on a job or order basis and selling to fabricators of kitchen equipment. The other primary metals manufacturing firm is engaged in drawing and insulating wire and cable of nonferrous metals from purchased aluminum and copper ingots.

The metal fabricating firms purchase the cold- and hot-rolled steel and by the use of tools, dies, jigs and fixtures, stamp and form the metal in punch and draw presses. Painting and plating operations are also effected prior to shipment of the parts to assembly plants throughout the United States.

Two firms were operating three eight-hour shifts per day at the time of the survey -- one a seven-day week, the other a five-day week. This pace is not maintained throughout the year, however. Another company was working two shifts five days per week with some overtime, while the oldest of the metalworking firms was on a one shift, five-day week schedule.

Operations at 75% of capacity were reported by two firms. Maximum capacity was either unknown or considered irrelevant by the remaining companies, but it was agreed that the plants were capable of expanding output considerably.

Sales and Distribution

Three of the four firms under consideration are dependent upon highly seasonal industries to absorb their product. The rapid growth of these industries, however, has obscured the seasonal fluctuations in sales experienced by the more mature firms in this industry.

In those firms with affiliates outside the state, contracts are negotiated by the parent company, and the Carroll County plants produce according to specifications received from the coordinating agency at the home office. Jobbers and distributors are used as product disseminators by at least one firm, buttressed by a roving sales force; some sales are made direct to large volume customers.

With one exception, the firms consider their market to be nationwide and have their channels set up accordingly. Even with a national market, however, these firms are almost entirely dependent upon a single industry for the sale of their product. The smallest of the firms in terms of both employment and sales also produces for a single industry.

For the most part these firms do not product for inventory and a relatively short lead time is allowed on orders. Hence, little warehouse space is needed. One firm, however, owns and operates warehouses in several major cities in the South and Southwest.

Trucks, both company owned and commercial, are used almost exclusively to transport the finished product.

Industry Growth Trends

Three of the four firms have expanded almost continuously since their establishment in Carroll County. At the time of the survey a total of 105,000 square feet of floor space was in the process of being added in the industry. This does not include the facilities of the newest metalworking firm in the county. Further, several thousand square feet of operating floor space had been added during the previous year.

Management appears very optimistic over the future of their respective companies in Carroll County. Bremen, 10 miles north of Carrollton, has a thriving metalworking industry, and Newnan, 20 miles southeast, has an affiliate of one of the Carroll County firms. West Georgia, for a number of reasons, apparently appeals to the metalworking industry. The abundance of labor, though unskilled, is admittedly a big factor. Proximity to Atlanta's distribution facilities and markets was not mentioned but it is no doubt another reason for the selection of Carroll County locations. As a source of raw material, Birmingham certainly has influenced decisions to locate metalworking plants in Carroll County. The labor climate in the area is another factor in Carroll County's favor as a location for the industry.

Food and Kindred Products (SIC 20)

Industry Composition and Characteristics

Carrollton is the food manufacturing center for Carroll County. Of the 12 establishments included in this classification -- four meat producers, one dairy processor, one beverage plant and six grain and feed mills -- all but three feed mills are located in Carrollton. Eight of the remaining nine firms located in Carrollton have been established since World War II.

Several unique features distinguish the single-firm industries from the others. The dairy processor is a co-operative organization of local farmers which serves Carroll and surrounding counties. The beverage industry is represented by a bottling plant of a large national organization and is only one of six such facilities located in west Georgia. In some instances, these two are treated separately in the following discussion because of their individualistic nature.

Four of the firms have, or are part of, affiliated interests. There is one co-operative, one partnership, three proprietorships and seven corporations.

Employment and Labor Supply

There are 378 persons employed in the food industry in Carroll County. Ten of the 12 firms have only one executive or administrative person, and only one firm employs technical personnel. The remainder of employment is mainly engaged in the production and maintenance aspects of the industry. Over 93% of the workers are employed by firms located in Carrollton -- again illustrating Carrollton's predominance in this industry. All but five workers live in Carroll County, most residing in the community in which they are employed. Four persons from Alabama work in Bowdon, and one employee commutes to Carrollton from Polk County.

In general there is little or no seasonal fluctuation in employment. Of those firms which do experience fluctuation, one maintains employment by adjusting hours, while only three actually lay off workers.

There is no requirement for a high degree of skill or for any particular type of skill in the food industry in Carroll County. Most production workers would be classed as semiskilled or unskilled, and wages reflect this classification. The legal minimum wage seems to be the rule, with only a few making more. There are some exceptions receiving \$1.50 per hour or more, but these are at a minimum and none are employed in feed mill operations.

Fringe benefits in the food industry are relatively weak. Only two firms provide vacation, sick leave, paid holidays, and hospital and life insurance benefits; others carry only some of these benefits. All but one firm allow at least one week's vacation, but in only three instances is this known to be paid. Only one firm allows an increase in vacation time coincident with consecutive years of service. The five firms which allow paid holidays give an average of three to four, usually including the major holidays such as Christmas, Thanksgiving, Easter and New Years Day. Of the five firms which provide hospital and life insurance, four participate 50% and the other pays all premiums, with the employee paying for dependents. One of the larger employers estimates his cost of fringe benefits, including Social Security and unemployment tax, at about 21 cents per hour.

There is apparently no labor shortage for the type of work performed in the food industry. Only one firm even hinted at there being an inadequate supply. This being a low-skill industry, there were few complaints pertaining to the quality of labor available. The only complaints concerning quality referred to clerical and office or management and supervisory personnel. In

some instances the persons interviewed expressed a known need for skills outside their particular operations, such as maintenance and shop personnel. Here again, only one firm complained of the quality of labor available, stating that all the good workers have jobs already. Vocational training facilities are not considered to be necessary for production workers, since they can be trained quite easily in a short time, but training would be quite beneficial in preparing people for office, clerical and some supervisory work. There was very little interest expressed in a possible co-op program with West Georgia College, since it was not thought to be applicable to firms in this industry.

There is no union representation in the food industry in Carroll County.

Materials, Supplies and Services

The bottling firm mentioned earlier, which is a subsidiary of a national concern, has all of its purchasing directed by a central headquarters located elsewhere in Georgia. Other than its packaging supplies, it purchases a number of materials which are unique to this one concern and especially to its product. For this reason the company has been omitted from discussion in this section.

Milk, sugar, salt, hay and burlap bags are the major items purchased locally for use in the food industry. Approximately 10,000,000 pounds of milk are purchased yearly from Carroll and the surrounding five counties. Sugar and some salt are purchased from a Carrollton wholesaler for use in both dairy and meat processing operations. Louisiana supplies the balance of salt consumed by this industry in Carroll County. Hay, burlap bags and corn, the only other locally supplied items, are used in many of the feed and grain mill operations.

Atlanta is a large supplier for many of the items consumed -- chocolate powder for dairying, fertilizer, burlap bags, meal and hulls for feed and grain mill use, cartons, boxes, caps and other packaging supplies. Cattle are also bought at auction in Atlanta.

Georgia-supplied items include cattle, broilers, dressed hogs, meal and hulls, feed concentrate, bottles, cartons and other packaging supplies.

Among the outstanding non-Georgia items are cattle from Alabama; hogs from Alabama and Kentucky; dry milk from Wisconsin; spices and feed additives from northern states; corn and grain from Alabama; meal and hulls from Alabama, Mississippi and Tennessee; dairy feed from Tennessee; minerals and pulp

for feed from Florida; paper bags from South Carolina; and packaging supplies from Florida.

The following partial list indicates some of the average quantities of these items consumed by individual firms per year:

Livestock	- over \$1,000,000
Dressed hogs	- over 1,000,000 pounds
Corn	- over 600 tons
Meal and hulls	- over 300 tons
Grain	- over 400,000 bushels
Concentrates	- over 5,000 tons
Minerals	- over 35 tons
Boxes	- over 40,000

The local bank is the only service utilized by five of the firms surveyed. Four different Atlanta accounting concerns are used by the other four firms, all of whom use their local banks to some extent. Atlanta banks are used by two firms, and a cooperative bank in Columbia, S. C., is used by a third. Other services used to some extent include architectural, advertising and design, engineering and consulting.

Only two firms expressed any dissatisfaction with the availability of materials, supplies or services. One would like improved livestock sources; the other desires closer sources of grain and concentrates for feed mill operations. There was also a need expressed for a soy bean processing plant, since there is not one presently located in the state.

Production

All firms engaged in the food industry in Carroll County operate on a process type production basis. Although six firms work more than a 40-hour week, only one operates two shifts daily. Of the remaining five, two are on a six-day schedule -- one operating eight hours and the other nine hours daily -- and three work an additional four-hour sixth day. Only four firms operate a standard 40-hour week (five eight-hour days). Overtime seems to be at a minimum, with none reported in feed mill operations. While one meat processor hinted at overtime troubles, the others seemed to accept it as standard practice.

At least 75 to 80 tons of meat are processed weekly in Carroll County, and this is only 70% to 80% of the maximum potential output. Coincident with this output are some seven to eight tons of waste products -- skin, bones and innards -- most of which is bought by West Georgia By-Products, Incorporated.

Dairy operations are operating at maximum output with no measurable waste or by-products.

Feed and grain mill operations seem to be running at considerable less than the maximum potential offered by existing facilities. One mill is on the verge of going out of business.

Sales and Distribution

Dollar sales volume per year per firm ranges from just over \$50,000 to more than \$2,000,000 in Carroll County's food industry. As could be expected, some of the lower sales volumes are in the feed and grain mills, while larger volumes are found among the meat processing firms. Only one feed mill mentioned an expected decrease in this volume for the current year, while the others surveyed expect the same or somewhat better.

It is surprising to note the different seasonal patterns among firms engaged in the same process. One feed and grain mill experiences no seasonal fluctuation, two experience slow winter months, while the others slow down during the summer. This is also true for the meat processors -- one reports slow summers, one slow winters, and the other no change at all.

Feed and grain sales are generally made direct to customers with some sales to dealers, dairies and brokers. One sells entirely to dairies. Dairy and meat products are sold to retail stores and institutions, such as schools and hospitals. Naturally, a substantial portion of dairy products is sold direct to customers via route salesmen.

Feed and grain mills generally serve the local market. However, one does serve Heard and Haralson counties as well as eastern Alabama. In addition to serving Carroll County, the other firms in the industry include Heard, Haralson, Douglas, Paulding, Cobb and Fulton counties in their market area. The one firm which serves a market outside of Georgia is a meat processor whose sales area covers the eastern United States.

Only two firms mentioned special markets. A large chain store consumes a major portion of one of the meat processor's output, while contract poultry farmers consume 80% of one of the feed and grain mill's output.

All firms have their own storage facilities and all ship by truck. At least seven ship by company-owned trucks.

Industry Growth Trends

Presently, the feed and grain mills are the only part of Carroll County's food industry which is suffering poor business conditions. This apparently results from the poor prices currently affecting the broiler industry and the fact that some of these mills previously included some cotton ginning, another declining industry. Therefore, the major plans of these mills include attempts to utilize existing vacated or inactive facilities and to decrease poultry feed production while increasing hog and cattle feed output.

The remainder of the food industry firms anticipate growth and expansion, although none include diversification. Frozen foods are increasing but it was mentioned that there are currently enough packers in the area to handle the anticipated demand for this product, although some firms plan to increase freezer facilities.

Although presently in a decline, the poultry industry is considered by one firm as an important stimulant to the area's economic growth since each stage of the process -- from hatching the egg to distributing broilers to consumers -- can be performed by local labor.

Overproduction in the poultry industry and lack of a federal inspection sticker, which is required for interstate commerce, are presently seriously limiting the market served by many of these firms, consequently posing a temporary obstacle to growth. Other problems affecting growth are securing finances to add buildings or simply finding ways to utilize current facilities. Also mentioned as a major obstacle to growth was a lack of competent supervisory talent in the local labor market.

Only two firms mentioned any community advantages or disadvantages, none of which they considered extremely significant. Mentioned were good schools, poor sewage and property devaluation.

Rubber and Miscellaneous Plastics Products (SIC 30)

Industry Composition and Characteristics

The two firms in this manufacturing category produce a narrow range of items including lawn mower tires, bicycle handle bar grips, tires for children's toys, and latex sizing for carpet backing. Both firms were originally induced to move South in order to better serve the textile industry. One of the firms has developed a wholly new product line completely unrelated to the textile industry. The parent plant of one of the firms is in Indiana; the other has no affiliates.

Employment and Labor Supply

Employment in this industry varies from a seasonal low of approximately 165 in the winter months to a high of 180 in the summer. Wages begin at the allowable minimum of \$1.15 per hour for trainees and advance to almost \$2.00 for highly skilled employees. The average for production employees is around \$1.35 per hour.

Fringe benefits include one to two weeks' paid vacation for hourly employees, two weeks for salaried employees, five paid holidays, and hospitalization and life insurance programs that are heavily participated in by the firms.

Management is well pleased with the quality of labor available in the area. Most jobs do not require highly developed skills; a raw worker can usually attain proficiency through on-the-job training programs within four weeks. Maintenance personnel, however, are at a relative premium. Management has reported a strong need for vocational training of machinists, welders and mechanics.

Materials, Supplies and Services

Materials in this industry include latex, isoprene rubber, mineral rubber, reclaimed rubber, pigments, clay and limestone, and antioxidants. The sources for all these materials except the clay and limestone are out of the state. A considerable amount, however, is purchased through distributors located in the larger Georgia cities. Packaging supplies -- cardboard boxes and paper -- are purchased from firms within the state. Tool and die work is contracted out to northern firms.

Production

It is not possible to measure output in this industry in common units, except in dollars, and that figure is not available. One firm works a three-shift per day schedule during the eight-month busy season, but it is still not operating at capacity. The one eight-hour shift per day firm is operating at a fraction of its capacity and has experienced a gradual decline in recent months.

Sales and Distribution

Sales are made through jobbers, direct to other manufacturers, and through company salesmen direct to the ultimate consumer. The market area is considered in one case to cover the U. S. and Canada, while one firm restricts its sales to Georgia and Alabama. Shipment is almost exclusively by motor freight.

Industry Growth Trends

One of the firms has enjoyed steady growth and is contemplating the development of a new product line. Management is happy with the business environment in Carroll County and sees a bright future. For the other firm in this industry, however, the picture is not nearly so promising. This firm has met with tough competition in its basic product line and is looking for ways to diversify.

Furniture and Fixtures (SIC 25)

Industry Composition and Characteristics

The furniture and fixtures industry in Carroll County is made up of five firms which manufacture a range of items including kitchen and utility cabinets, Early American living room furniture, and bedding, mattresses and lounges. Two firms are located in Temple, two in Carrollton and one in Villa Rica. The latter firm is located in that part of Villa Rica which is in Douglas County. Despite this technicality, the firm was included in the survey. One of the Carrollton firms could not be contacted and has been excluded from this analysis.

Two firms began in the early forties as purely "sideline" custom operations which have expanded to full-time businesses. The other two were established as full-time operations in the early fifties. The one firm which is not incorporated is one of the older firms and still operates as a proprietorship. One firm is an affiliate of a local concern, while another is affiliated with a national organization with headquarters in California.

Three manufacturers house their entire production operations in one building, while the other processes and finishes in separate buildings. The furniture and cabinet manufacturers have complete woodworking and finishing equipment (saws, drills, lathes, sanders, planers, shapers, etc.) which is generally in good condition, while the mattress processor has the necessary sewers, edgers, fillers and cotton preparers.

Each has adequate land available for expansion, although one is somewhat limited since other buildings are also housed on the site. Utility service is also adequate and all sites are adjacent to highways. The Carrollton firm is the only one with sewage facilities; the others use septic tanks.

Employment and Labor Supply

Of the 90 persons employed by this industry, 75 are engaged in the actual production process. Each firm has one manager with one or two supervisors, and only one firm has a full-time sales force. One secretary-clerk seems to be adequate to handle these duties for each company. Employment remains fairly steady in the industry. The largest employer, however, lays off workers during the slow period from January through April.

Wages for production workers range from \$1.30 to \$2.50 per hour, with an average of \$1.55 per hour. One company has no established fringe benefit policy. Others provide one week vacation and hospitalization and life insurance coverage, with company participation ranging from 25% to 100%. At least five paid holidays are allowed by two firms. Other benefits varying among concerns are paid sick leave, bonus plans, and vacation increases, based on consecutive years of service, up to a total of two weeks.

Labor is available in adequate quantity, although not quite as skilled or experienced as is desired. However, there seems to be no problem with training workers on the job and the general reaction to proposed vocational training facilities was that it is not necessary for this type of work. Most firms apparently prefer to train workers to suit their individual styles and operations and feel it is more desirable to do their own training. This is not true of one firm which recently lost 10 employees to a newly established plant. This firm is suddenly aware of the serious shortage of skilled and experienced workers and believes a vocational training school would be quite helpful. If the other firms were to experience more frequent turnover -- in the past extremely low -- they too might place a greater value on such facilities. All felt a co-op program with West Georgia College would not be adaptable to this industry.

There is no union representation among the work force, all of whom live in the community in which they work.

Materials, Supplies and Services

To a limited extent materials are purchased in Carroll County. Items such as mattresses, welt cord and cotton waste are either products or by-products of local concerns which supply the furniture industry in the county. Lumber, the primary raw material used in the industry, is obtained from Alabama, South Carolina, North Carolina, Virginia and some locally. Two firms purchase a combined total of 55,000 board feet of poplar monthly from local

sources and Alabama. Other lumber supplies, including plywood and shelving, are obtained from Atlanta distributors. Atlanta is the source of many other items including muslin, polyfoam, plastics and hardware. Small amounts of upholstery and mattress material are secured from North Carolina, Tennessee and California. The remainder of materials supplying the industry include cotton from Georgia, mattress bags from Tennessee, and springs and burlap from California.

The major supplies for the industry -- saws, blades, belts, sandpaper, etc. -- are purchased from Atlanta firms. Paints, thinners, lacquers and other finishes are obtained from a variety of sources including Atlanta, Toccoa and Indiana. Over 90 gallons of paint and thinner are consumed weekly by one firm. Glue is purchased from Atlanta, while packaging materials, such as cartons, tape and wrapping paper, are obtained from Atlanta, Rome and Tennessee.

Other than local banking facilities, outside services used are kept to a minimum. The California headquarters handles all accounting for its affiliate in Carroll County, while another firm uses a Carrollton accounting firm. In one instance Rome and Atlanta companies are used for equipment maintenance and repair.

Poplar is somewhat difficult to secure during the winter, but this represents the only problem in obtaining necessary materials and supplies.

Production

Two firms operate as modified job shops, doing only custom work. The other two are continuous process operations. Only one firm is presently operating at maximum potential output, while the remaining three are operating at only 50% of capacity. All firms normally work a 40-hour week. Only one firm requires much overtime, working a 10-hour day during its heavy season of September through January. An unusual 40-hour week is scheduled in one instance -- four nine-hour days and one four-hour day. Total industry output approaches 300 to 350 units per week.

Shavings, the largest volume waste material, are usually sold for use as chicken litter. Material scraps are sold to local dealers.

Sales and Distribution

Data are not available to give an accurate estimated sales volume for the furniture and fixtures industry in Carroll County. Previously indicated

production figures provide the best indication. Only one firm mentioned a specific sales figure -- \$130,000 per year -- and it is not known whether or not this is a representative figure for the firms considered. Generally, sales are made direct to retailers or customers, in some instances through manufacturers' representatives. Some sales are made through wholesalers, while in one instance sales are made to house contractors, with the manufacturer performing the installation.

Two companies concentrate most of their sales in a market area covering a 40- to 50-mile radius of their plants, with one firm limiting sales outside this area to northeast Georgia. Only one firm serves a national market, while the remaining company serves the southeastern states. Some exporting is done by one firm, while West Georgia College and a large Chicago catalog house represent the only other special industry markets.

The winter months seem to be the slow seasons for the two companies experiencing seasonal sales fluctuations. Heavy months include September through January for the other firms.

Shipments are made almost entirely by company-owned trucks, with only a small portion by rail or common carrier. Each firm has its own storage facilities.

Industry Growth Trends

None of the Carroll County representatives of this industry had much knowledge of over-all industry trends -- only local trends and how they might be affected. They seemed pleased with present conditions (one firm reported an increase in volume of business of 200% over the previous year) and do not seem to have any particular problems or obstacles to growth. In fact, each one has either just recently completed expansion, is in the process of expanding, or has plans to expand within the next year or two.

Lumber and Wood Products (SIC 24)

Industry Composition and Characteristics

This survey was limited to the established lumber companies in the county that are engaged in sawing and finishing rough lumber from timber that is supplied by either independent logging contractors or by affiliates. No attempt was made to ascertain the extent of independent logging operations because of the erratic nature of these operations. Those logging camps that are operated in combination with sawmills and/or lumber yards were accounted for, however.

Three of the four firms in the county are located in Carrollton; the other one is in Villa Rica. Of the three in Carrollton, one has a captive market for its lumber and does not sell to the public. All the lumber is consumed internally in the construction of shell homes which the company considers its end product.

All the companies were established in the 1930's with the exception of one which began operations in 1942. Only one has adopted the corporate form of business organization, and this is the only one with affiliated firms.

The principal output is finished and rough pine lumber, although some hardwood is processed by at least one firm. Detailed information on the smallest of these four firms was not obtained due to scheduling difficulties. The following discussion relates to the three largest concerns, although employment figures include an estimate for the fourth.

Physical Facilities and Services

It is difficult to generalize regarding the condition of buildings and equipment in this industry. It is safe to note, however, that the equipment has not been updated technologically. Since sawmill equipment is not subject to rapid obsolescence, machinery is not discarded in favor of more efficient machines except in the very large firms.

The buildings are, with one exception, in a general state of disrepair, and no observable attempt is being made to correct this. No statements were made that indicated an intention to modernize the structures.

Most of the products in this industry move by truck despite the location of rail spurs on the property of two of the firms.

Employment and Labor Supply

The 75 employees in this industry probably have the least amount of formal education and acquired job skills found in any industry in the county. The 52 production employees, predominantly Negro, are especially lacking in training. The most skilled are either sawmill equipment operators or truck drivers. More skilled and semi-skilled workers are employed by the firm that manufactures shell homes than by all the other firms combined.

The hourly wages range from the legal minimum of \$1.15 to a maximum of \$1.75. One firm reported an overall average of \$1.50, but it is doubtful that this is typical of all the firms.

This industry is forced to reduce its work force in the winter months due to restricted logging operations. When the timber is available, however, the mills operate. The severe weather affects operations only to the extent that there is a reduced flow of raw materials to the mill.

Fringe benefits are almost nonexistent in this industry. Only one firm reported company participation in an insurance plan offered to its employees. None have set policies regarding vacations and/or holidays for the production employees, although office personnel in one of the firms are granted holidays and vacations on a regular basis.

With one exception, management evidenced complete satisfaction with the local labor supply, both as to quantity and to quality. As stated above, no skills are required for most jobs in this industry, and unskilled workers are plentiful in the area. Management has apparently adjusted itself to the high labor turnover rate, even welcoming it when operations must be reduced in the winter months, and does not consider this a major problem.

Materials, Supplies and Services

The firms in the lumber industry are being forced to roam farther and farther from their mill sites to find timber suitable for their use. Most of the timber for one firm comes from Alabama, delivered by independent logging contractors. Another operator, who contracts with landowners for standing timber and maintains his own logging crew, reported that he is venturing into neighboring counties to find stands of timber worthy of attention.

Bits, saws, drills and other miscellaneous mill supplies are usually purchased locally, but Bremen evidently gets some of the business of these firms. A wider selection of supplies is probably available in Bremen. Carroll County banks are generally used, but a Bremen bank is used by one of the firms. Atlanta accountants are used by two of the firms.

Production

All mills work eight-hour days, five days per week. No overtime was reported. The two firms (excluding the captive market concern) surveyed were producing at an annual rate of approximately eight million board feet. This could easily be doubled without straining present facilities, according to the managers.

Waste products -- shavings and sawdust -- are sold to local chicken farms for litter. One firm sells two to three rail cars of wood chips per week to a Georgia paper mill.

Sales and Distribution

One operator reported a loss of \$2,000 on 1961 sales of \$128,000. The demand for his product was not great enough to support the volume necessary for profitable operations. Dollar volume of sales was not given for the other firms.

Both firms surveyed sell direct to individual consumers as well as to contractors and lumber brokers. One firm found a market for the bulk of its output in Ohio where it is used as decking for railway cars. Neither of the mills has found a market for its lumber in the Atlanta area. More than 90% of the output is shipped to points west of Carroll County.

Except for shipments to Ohio, trucks are used almost exclusively to move the finished lumber.

Industry Growth Trends

Management attributes the general decline of the lumber industry in Carroll County to the (1) importation from the West Coast of fir lumber that sells at competitive prices; (2) the increasing use of concrete, metals, asphalt and plastics in the construction industry; and (3) the dwindling supply of suitable timber in the area. There are no apparent reasons why this trend should not continue.

Printing and Publishing (SIC 27)

Industry Composition and Characteristics

Carroll County supports four weekly newspapers: the Carroll County Georgian and the Times Free Press, both published in Carrollton; the Villa Rican, published in Villa Rica; and the Bowdon Bulletin, issued from Bowdon but printed in Carrollton. One of these firms does some commercial printing, and another prints a small amount of circular material.

The county has one firm that deals exclusively in the commercial printing trade. It produces a complete line of printed materials for the business community -- letterheads, receipt books, invoices, bookkeeping materials, brochures, etc. In another community one of the newspaper publishers also does some commercial printing, mostly for local business firms.

The newspapers are fairly old; one was established before the turn of the century, and two of the remaining three followed shortly thereafter. The commercial printing firm was also founded in the early 1900's. All the firms are home-grown and operated, only one having an affiliate.

It appears that the equipment is more than adequate to meet present, as well as short-run future, needs. Much of the machinery is relatively new and all of it is excellently maintained. Major pieces include offset presses, letterpresses, linotype machines, Ludlow machines, plate-making equipment for offset printing, automatic scoring and folding machines, and peripheral equipment.

Employment and Labor Supply

There are approximately 40 full-time employees in this industry, a considerable proportion of which are highly skilled craftsmen. Employment is not seasonal, but varies slightly in at least one of the firms. Due to the skill requirements and concomitant high demand for labor in this industry, the fluctuation in employment affects the unskilled workers only.

Wages in this industry are relatively high, ranging from the legal minimum of \$1.15 per hour for a new untrained employee to over \$3.00 per hour for a highly skilled employee with many years of experience.

Fringe benefits are relatively liberal -- far ahead of most other industries in the county. A paid vacation of one week is typical, along with five or six paid holidays. The firms participate in hospitalization and life insurance programs, and profit-sharing plans have been installed by two of the concerns.

As might be expected, turnover rates are very low in this industry. Management, therefore, does not feel a strong need for additional experienced personnel. All firms train their own operators and reported no difficulties in locating desirable trainees for this purpose. Growth has been slow enough to allow the required training to take place as additional staff requirements materialized.

Little or no commuting takes place in this industry. The jobs are considered permanent enough that employees move if necessary to get in or near the community in which the shop is located.

There are no labor unions in this industry.

Materials, Supplies and Services

The exact quantity of newsprint and fine paper consumed is not available. Probably in the neighborhood of 100 tons of newsprint are procured annually from a plant in Tennessee. Due to the many grades and sizes of fine paper used in commercial printing, no reliable estimate can be made of the volume used.

Atlanta paper distributors supply most of the needs of this industry, with one Macon firm participating to a limited extent. Some of the supplies used are inks, chemicals, offset plates, plastic bindings, stitching wire, paste and glue. Management is, in general, well pleased with present sources of supply and sees no need for the cultivation of additional sources.

Production

It is almost impossible to reduce the output of this industry to a common unit other than dollar volume, and this measure is not available. The industry operates a standard eight-hour day, five-day per week schedule, with very little overtime.

Sales and Distribution

The market area is considered to include a 30- to 40-mile radius of Carrollton. This includes contiguous Georgia counties of Haralson, Paulding, Douglas, Coweta and Heard, and Randolph and Cleburne counties in Alabama. The commercial printing firms serve the business community primarily, with manufacturing concerns being the largest single customer group. Because of the individual nature of most of the work performed for business firms, there is very little need for inventory. The newspaper publishers are almost exclusively dependent upon the post office for distribution; the commercial printers deliver in trucks.

Industry Growth Trends

Activity expands in this industry in direct proportion to growth in other business firms and the accompanying population increases. Management is very optimistic regarding the future of this industry. Positive efforts are now being made to enlarge productive capacity to take care of the expected sustained increase in demand -- both for commercial printing and newspaper subscriptions. Due to the increasing cost for new printing equipment and the resulting necessity for full, or near full, operations for profitable operations, management sees a trend toward centralized printing plants to take care of the printing needs of several surrounding counties. Managers consider the wage differential a major advantage to them over the unionized Atlanta shops.

Chemicals and Allied Products (SIC 28)

Industry Composition and Characteristics

This industry is represented by two firms which manufacture a broad line of industrial chemicals and various types and mixes of fertilizer. Both firms are located in Carrollton and are affiliates of larger parent concerns. Both mentioned availability of a building as one of the factors influencing their choice of site.

Each has "split" facilities, with warehouse and office space in one building and manufacturing operations in another. Each has an expandable site accessible by truck from the main highway, with each site having a usable rail spur. Sewage and utility services are adequate.

Employment and Labor Supply

Less than 50 persons are employed in this industry, with just less than 75% performing the actual production operations. Wages range from minimum to less than \$2.00 per hour with an average close to \$1.35 per hour. Fringe benefits seem adequate, with at least one to two weeks' vacation plus group life and hospitalization plans in which companies participate 50% to 100%. There is no union representation among these workers.

The only seasonal fluctuation in employment occurs during late summer and early fall when there is some employment increase. Most seasonal workers can be obtained from the local area, as are the permanent employees.

The quantity of labor is adequate, although not always of the quality desired. However, only unskilled or semiskilled labor is necessary, requiring little or no training. Possible vocational training facilities would be useful only in preparing clerical, secretarial or administrative personnel, which are not in any particular demand presently. No enthusiasm was demonstrated for a possible co-op program with West Georgia College.

Materials, Supplies and Services

Few of the materials for this industry are produced in Georgia, although many are distributed through Atlanta jobbers. Limestone and liquid nitrogen are the only local materials consumed in substantial quantity, with other items, such as acids and oils, coming from as far as Texas, West Virginia, Utah, Colorado and New Mexico. The remainder of the materials consumed are purchased from surrounding states.

Packaging supplies are secured from Florida, Georgia, South Carolina and Missouri. Maintenance supplies are purchased from supply sources in Atlanta.

Local banking is the only service utilized by either firm, since the major portion of this work is handled by the parent company.

Both firms expressed strong interest in securing raw materials and supplies from much closer sources, preferably Georgia.

Production

There being but two chemical firms in the county, production output must be withheld to avoid disclosure. Both are operating at greater than 80% of maximum potential output, however. Both are continuous process operations working standard 40-hour weeks (five eight-hour days). Neither has any by-products or waste materials.

Sales and Distribution

Total yearly sales for this industry exceed \$1,000,000, most being made by salesmen working out of company headquarters. Only one of the firms serves a national market, the other limiting sales to northern Georgia. Sales are affected only by those seasonal patterns discussed in the "Employment" section.

Storage of finished products is in company facilities and shipments are made by both rail and truck.

Industry Growth Trends

Company and industry growth trends seem to be favorable, but neither firm has any immediate expansion or diversification plans.

Stone, Clay and Glass (SIC 32)

Industry Composition and Characteristics

All four firms in the stone, clay and glass industry are located in Carrollton and manufacture concrete, concrete products, and marble and granite monuments. Two are incorporated, while one operates as a proprietorship. The fourth firm could not be contacted during the survey period and is not included in the following discussions. The oldest firm, in existence 68 years, is the only one with affiliated interests. The remaining firms were established within the last five years.

Buildings and equipment are satisfactory, but plant sites are too small to allow for much expansion. Sites are easily accessible by truck and two

have access to adjacent rail facilities when needed. Utility and sewage services are adequate, and only one firm uses septic tanks.

Employment and Labor Supply

Twenty-three of the 30 employees in this industry are engaged in actual production operations; only two of these workers could be classified as skilled. Wages range from \$1.40 to \$1.70 per hour, with the average close to \$1.65 per hour. Although subject to some seasonal effects, employment remains relatively steady. Employees are covered by group insurance plans, with all firms participating in payments. This is the extent of fringe benefits in one firm, while the others include one week's vacation. Only one firm allows both paid vacations and paid holidays.

Requiring unskilled workers only, the local labor market is quite adequate, although some employers report that many persons lack initiative and some of the more desirable worker traits. With skill requirements at a minimum, formal training was not indicated to be needed or desired. Thus, neither the proposed vocational training facilities nor a co-op program with West Georgia College received much enthusiasm.

Most of the employees live in the Carrollton area. They are not unionized.

Materials, Supplies and Services

Georgia manufacturers supply the entire quantity (over 50,000 tons per year) of sand, gravel, galite and crushed granite consumed by the three firms surveyed. The only material purchased from outside Georgia is cement base -- and this only in part. The only supplies purchased in this industry are acquired from northeast Georgia. All materials except granite and cement are purchased entirely from northwest Georgia manufacturers. But, even with materials this close, there was a desire expressed to establish quarrying operations in Carroll County to support and aid these existing firms by decreasing transportation expenses. This, then, is the only Carroll County industry supplied entirely by firms in Georgia, with all materials purchased from the same area of the state.

Banking and accounting services are provided locally. The only outside service used is the design of monuments by a northeast Georgia company.

Production

Since each firm has a different measurement of production, it is not possible to estimate total annual industry output. Two firms operate on a

continuing basis and the other produces to customer orders. Each considers itself to be operating at maximum potential output. Two firms work five eight-hour days plus one-half of a sixth day, and the other works one shift five days a week, usually totaling less than 40 hours.

There is no by-product or waste resulting from the manufacturing operations of these companies.

Sales and Distribution

Annual sales exceed the quarter million mark in this industry, with the lowest volume of sales reached during the winter when construction is slowed. Sales are made direct to contractors or individual customers, usually within a 25- to 60-mile radius of Carrollton. All shipments are made by truck. There are no special markets now being served.

Two firms store at their own facilities, while the other has no storage of finished goods.

Industry Growth Trends

With the major portion of output being consumed by the construction industry, it is only natural that growth is largely dependent upon that industry. Presently, owners feel optimistic about the coming year's prospects. For one concern, recent affiliations with similar operations in the area should help its future growth.

Only one firm is encountering an obstacle to growth in that its present site is seriously limiting expansion of production facilities necessary to meet the increased demand. Also, capital is required to update present equipment and to buy new equipment.

The poor attitude by "uptown" merchants to local growth and improvement was cited as one community disadvantage.

Leather and Leather Products (SIC 31)

Industry Composition and Characteristics

There is only one firm in the leather industry in Carroll County. No detailed discussion will be made in order to avoid disclosure of information given in confidence.

This firm manufactures a line of ladies' and children's shoes. It was established in 1946 as one of 37 branch plants in the South serving a parent company in Nashville. Employment ranges between 150 and 200 persons, largely unskilled. They are not unionized.

As a branch plant their materials and services are obtained through the home office. The bulk of these supplies consists of only five major items.

It is a typical assembly-line process, operating a standard 40-hour week. All output and scrap are handled by the parent company.

Miscellaneous Manufacturing Industries (SIC 39)

Industry Composition and Characteristics

Only one firm in Carroll County is classified in the miscellaneous manufacturing category. To avoid disclosure of information relating to a single firm, details of the company's operations are withheld.

Located in Villa Rica, the manufacturing operation is a branch plant of an Atlanta-based firm producing metallic caskets. The branch plant, established in 1950, now employs approximately 350 persons.

APPENDICES

Appendix 1

METHODOLOGY

Purpose and Approach

The purpose of this study was to analyze manufacturing operations in Carroll County and to identify opportunities for economic growth offered by existing industry, either through expansion and diversification or through the development or attraction of other companies which may be interested in relating their operations to the needs of those firms which are already found in the area.

The approach developed is detailed in attached Exhibits 1, 2, 2a and 3. The following steps of the work program have either been completed or are now being implemented as part of the overall economic development program sponsored by the Area Redevelopment Administration (ARA):

1. Available background data on all manufacturing firms in Carroll County were collected.
2. A detailed plan for interviewing all manufacturers in the county was developed, and necessary forms, letters and schedules for implementing the plan were prepared.
3. Each available manufacturer in Carroll County was interviewed to secure information relating to the identification and description of the company, physical facilities and services, employment and labor supply, materials and supplies, production, sales and distribution, and other related information.
4. A concise but complete report was prepared on each manufacturing firm in Carroll County.
5. The individual reports on each firm were grouped according to major industrial classification and synthesized into complete descriptions of each industry in Carroll County.
6. The industry analyses, included as part of this report, are being used to investigate specific expansion and diversification opportunities.
7. Technical assistance is being given on a continuing basis to individual firms as required to identify and resolve problems affecting efficiency and growth.
8. Each manufacturer has received notice that upon a show of interest, specific leads on government contract and export trade opportunities will be forwarded as they develop.

9. Product and industry analyses developed by the Industrial Development Division as part of other projects are being made available to Carroll County manufacturers for possible application to their own operations.

Methods used in accomplishing each of these steps are discussed in detail in the sections which follow.

Accumulation of Manufacturing Data

Before field work was begun on the industrial survey, local sources of information were contacted and a literature search was made to identify manufacturing firms in Carroll County and to accumulate background information on industrial activity in the study area. Principal sources and types of information included the following:

1. Atlanta Regional Office of the Housing and Home Finance Agency -- data relating to the industrial pattern in the community, wages received by job category in each industrial firm, and commentaries on the history of the various firms and/or industries, accumulated by HHFA as part of the research phase of public housing programs with the three largest towns in Carroll County.

2. Employment Security Agency of the Georgia Department of Labor -- current and historical data relating to employment and wage payments for manufacturing firms in Carroll County with four or more employees.

3. Georgia Manufacturing Directory, 1960-1961, compiled by the Industrial Development Division for the Georgia Department of Commerce -- listing of manufacturing firms by city and industrial classification with information on key personnel, major products and employment.

4. Carrollton Chamber of Commerce -- list of manufacturers and specific information relating to the growth and development of existing firms, as well as leads on individuals and/or organizations that are either in the process of forming a manufacturing facility or are interested in doing so.

5. Industrial Development Division files -- clippings, publications, and other information on industrial and economic activity in Carroll County and communities within the county.

From these information sources, 99 manufacturing firms were identified as being or having been active in Carroll County. Although it was anticipated that some of these firms would be found to be inactive and that others would not qualify as manufacturers, each was listed for investigation during the field survey. A reference file was set up and available background materials were filed on each manufacturing company. Industrial and economic data on the county and communities involved were abstracted and held for later analysis.

Development of Survey Plan

In order to facilitate the orderly completion of the industrial survey and to coordinate the efforts of the interview team, a detailed plan was developed for interviewing each manufacturer in Carroll County. In summary, this plan outlines the procedure to be followed in preparing and scheduling the mailing of an introductory letter to each firm, establishing specific interview dates and times, maintaining records of interviews scheduled and completed, conducting the interviews, and preparing preliminary reports on the surveyed firms. A copy of the detailed plan is included as Exhibit 1.

Implementation of the plan required the development of an introductory letter and enclosure and an interview guide. The purpose of the introductory letter was to acquaint the manufacturer with the overall program, to explain the purpose of the industrial survey, and to inform him that a telephone contact would be made to arrange for a plant visit. The enclosure outlined the survey questions that would be asked. Although the same information was sent to each manufacturer, each letter was personalized by being individually typed and signed by the person who was to conduct the interview. Copies of the letter and enclosure are included as Exhibits 2 and 2a.

An interview guide was developed to insure completeness and consistency while maintaining a degree of informality in conducting the plant interviews. Care was taken in developing the interview guide to make certain that all areas of information were covered that would contribute to the industrial analysis as well as other phases of the project. The use of a questionnaire form was rejected in favor of the interview guide because of the formality of the questionnaire approach and the difficulty of recording information in predetermined space allocations on a questionnaire form. A copy of the interview guide is included as Exhibit 3.

Interviewing Manufacturers

The detailed plan for interviewing manufacturers in Carroll County was followed as closely as possible in scheduling and conducting plant visits and interviews. Some scheduling difficulties were encountered due to the absences of key plant officials and, in relatively few cases, the unwillingness of manufacturers to cooperate fully.

Interviews were generally conducted individually by members of the interview team. If the size or complexity of the manufacturing operation warranted, however, two interviewers would visit the company to insure complete coverage

and to facilitate the recording of essential data. Interviews ranged in time from less than one hour to more than three hours. In most instances, the interview was preceded or followed by a tour of the plant and plant site.

Despite the effort to prepare an accurate list of manufacturers prior to the implementation of the interview plan, many inaccuracies were found after the survey was started. Of the 99 firms tentatively identified as manufacturers, 33 were eliminated during the interview period, either because they were not engaged in manufacturing or were out of business. Interviews were completed with 59 manufacturers out of a verified total of 66 firms found to be active in the county.

Preparation of Company Reports

Following each plant visit, the interviewer prepared a concise but complete report on the manufacturing firm. The reports were standardized for analysis purposes, following the format established by the interview guide.

A report was prepared on each of the 59 manufacturers interviewed. Copies of the reports were made available to all staff members for use in other phases of the project. Original copies of the reports were held in company reference files for use in analyzing and evaluating the industrial structure and expansion possibilities in Carroll County. Because some of the information was given in confidence, individual company reports were not used in any of the published materials resulting from the project.

Preparation of Industry Reports

In order to facilitate the analysis of the industrial complex, the individual company reports were grouped according to major industrial classification as defined in the Standard Industrial Classification Manual. Industry descriptions were then developed from these grouped reports. These descriptions provided an overall view of the state of the condition of each industry in Carroll County.

Expansion and Diversification Investigation

By having total industry figures quickly available -- figures on such things as total consumption of specialized raw materials, component parts and supplies; geographical sources of supply of each consumed item; volume of production and the markets served; and employment and labor supply -- the evaluation of specific opportunities is being greatly facilitated. This is being done on a continuing basis. These industry analyses will provide the background

for locally sponsored studies on other manufacturing opportunities for Carroll County.

Technical Assistance to Manufacturers

All Carroll County manufacturers have been encouraged to take advantage of the facilities at Georgia Tech for the resolving of operating problems. Activity must, of course, originate with the individual firm. Requests for assistance are assigned to a staff member qualified in the particular facet of operations under study, and personal visits to the plant are made as necessary to resolve the problem.

Export Trade and Government Contract Opportunities

As a part of the program to stimulate business activity in the most direct manner, IDD staff members, through a variety of source materials not usually read by the small manufacturer, keep informed on opportunities in export trade and the securing of government contracts and sub-contracts. Information on such opportunities is transmitted to the appropriate manufacturers with instructions on how to proceed. Because of the staff's familiarity with the firms' production capabilities developed through the survey, this is done with a minimum of wasted motion.

Availability of Product and Industry Analyses

The Industrial Development Division continually develops studies on specific products, concentrating for the most part on the feasibility of manufacturing and/or distributing the product in Georgia. Carroll County manufacturers have been sent a bibliography of these reports and, upon request, are supplied with copies of those reports that they feel may have applicability to their own operations. More detailed studies on these and other products will be made on request as part of the development program.

Exhibit 1

DETAILED PLAN FOR INTERVIEWING MANUFACTURERS IN CARROLL COUNTY

1. A letter briefly summarizing project goals and explaining the need for the information to be requested will be sent to each manufacturing firm in Carroll County. An outline of the Interview Guide will be included with the letter to acquaint the firm with the nature of the information to be secured. The firm will be alerted that contact will be made soon for the setting of a specific time and date for the interview.
2. In order to minimize the elapsed time between receipt of the above letter and the actual interview, the letters will be sent in timed sequence to pre-selected groups of firms, and the interviews will be scheduled accordingly. For example, it is anticipated that the small towns will receive the letter at the same time and will be the first to be interviewed. There will be four groups of mailings covering an interview period of six weeks.
3. Specific appointment dates and times will be established after the first group of firms have had an opportunity to digest the interview outline for three or four days. On Monday of the first week of interviews, the letter described above will be mailed to the second group of firms. Toward the end of the first week of interviews, appointments will be made with the second group for the following week by interviewers in the area. This sequence will be followed until interviews are completed.
4. An interview time chart will be maintained by the phase director in order to minimize conflicts and to aid in scheduling interviews in such a way that transportation facilities will be utilized in the most economical manner. Each interviewer will be responsible for keeping the chart up to date with information pertaining to the firms for which he is personally responsible.
5. Interviews will be scheduled at the convenience of the firms. Requests for appointments will not be made for Monday mornings or Friday afternoons when the typical firm is usually overwhelmed with start-up and shut-down operations.
6. To the extent that the questions are applicable, the Interview Guide sequence will be followed as closely as possible to facilitate later analysis and evaluation. Considerable personal judgment will have to be exercised by the interviewer in regard to relevance of questions to particular firms.
7. The tabulation and reorganization of interview results and the preparation of a preliminary report on each company will be accomplished as soon as possible after the interview. Interview notes should be expanded immediately after the interview is completed, if possible. The preliminary report draft should be completed no later than the end of the week in which the firm is interviewed. Monday mornings and Friday afternoons and any other free time in which interviews are not scheduled will be used to work on these drafts.

Exhibit 2

INTRODUCTORY LETTER

Date:

Company
Address

Dear:

As you perhaps know, the Area Redevelopment Administration of the U. S. Department of Commerce has contracted with us to conduct an extensive program to encourage the economic development of Carroll County. One of the objectives of our study is to identify opportunities for new economic growth offered by existing industry -- through expansion or diversification or through the development or attraction of new companies to serve firms already found in the area.

To assist in realizing this objective, we need to know as much as possible about each manufacturing operation in Carroll County. We would like, therefore, to visit your plant to meet you, to become more familiar with your company's production capabilities, and to identify areas in which we might be of assistance to you and your community.

I will call you soon to arrange a convenient time for a personal visit. In the meantime, I hope you will find time to consider carefully the enclosed list of questions which we would like to discuss with you. You may be certain that the information which you share with us will be held in strictest confidence and will be used only for the purpose of assisting you and the economic growth of Carroll County.

Sincerely,

Signed

--/--

Enclosure

Exhibit 2a

ENCLOSURE TRANSMITTED WITH INTRODUCTORY LETTER

Description of Company: What types of products do you manufacture or what services do you provide? What are the names and titles of your key management personnel? Is your company a proprietorship, partnership or corporation? How did your company start? How was the present location chosen? Is your firm affiliated with any other companies?

Physical Facilities and Services: What is the size of the building(s) which you occupy? What major pieces of production equipment do you have? How large is the site on which your plant is located? Is useable expansion area available? What transportation facilities are available and how satisfactory are they? What types of gas, electricity, water and other utility services are available and how adequate are they? Are sewage and waste disposal facilities adequate?

Employment and Labor Supply: What is your average employment (by sex, race and type of work)? Do you have seasonal fluctuations in employment? What are your average wage rates for major job categories? What fringe benefits do you provide for your employees? Do you have any difficulty in finding the types of employees you need? How productive, trainable and dependable is the local labor supply? What specific types of vocational and technical training would be particularly helpful for the types of workers you employ?

Materials, Supplies and Services: What types and quantities of raw materials and consumable supplies do you use and where do you procure them? What types of outside services do you use, where do you procure them, and how adequate are they? Would it be helpful to you if there were additional local sources of materials, supplies and services?

Production: What type of production process do you have? How many shifts do you normally operate per day? What is your normal or average output (in units and/or dollars)? What is your maximum potential output with present facilities? What types of by-products or waste do you have? How do you dispose of your by-products or waste?

Sales and Distribution: What is your annual sales volume? Are your sales seasonal? What distribution methods and channels do you use? What market area do you cover and in what areas are your sales concentrated? What special markets do you serve (government, export, large companies, etc.)? Where do you store and how do you ship finished products?

Other Information: Is your company and industry growing? Do you have any specific expansion or diversification plans? What do you consider your major problems or obstacles to growth? What advantages and disadvantages do you find in doing business in your local community?

Exhibit 3

INTERVIEW GUIDE

A. IDENTIFICATION OF COMPANY

1. Firm name
2. Street address
3. City, county and state

B. DESCRIPTION OF COMPANY

1. Products and/or services (describe in detail)
2. Names and titles of key personnel (include president, manager, purchasing agents, and others)
3. Type of ownership (proprietorship, partnership, corporation, etc.)
4. Brief history of company (include date established and reason for location)
5. Affiliated companies (indicate names, locations, and products or services)

C. PHYSICAL FACILITIES AND SERVICES

1. Buildings (specify number, types, sizes and uses)
2. Equipment (describe and evaluate major pieces)
3. Site (specify size and useable expansion area)
4. Transportation facilities (accessibility of rail, highway, water, etc.)
5. Utility services (types, sources and adequacy of gas, electricity, water, etc.)
6. Sewage and waste disposal facilities (type and adequacy)

D. EMPLOYMENT AND LABOR SUPPLY

1. Average employment (specify number by sex and race for each classification):
 - a. Executive and administrative
 - b. Technical and professional
 - c. Clerical and secretarial
 - d. Production, maintenance and materials handling
 - e. Other (specify)
2. Seasonal fluctuations in employment
3. Average wage rates for major job categories
4. Fringe benefits (describe and indicate approximate cost per hour)
5. Union affiliation
6. Management's evaluation of local labor supply:
 - a. Quantity (specify shortages by title)
 - b. Quality (productivity, trainability, attitude, dependability)
 - c. Training needs (specify types of vocational and technical training needed)
7. Commuting area
8. Reaction to West Georgia Co-op program

E. MATERIALS, SUPPLIES AND SERVICES

1. Raw materials (describe types, sources and quantities used)
2. Supplies (describe types, sources and quantities used)

Exhibit 3 (Continued)

E. MATERIALS, SUPPLIES AND SERVICES (Continued)

3. Services (describe types, sources and adequacy of regular services used -- outside processing, design services, banking, consulting, etc.)
4. Management's evaluation of need for additional local sources of materials, supplies

F. PRODUCTION

1. Type of production process
2. Normal production schedule (number of shifts per day, overtime requirements, etc.)
3. Normal or average output (in units and/or dollars)
4. Maximum potential output (with present facilities)
5. By-products or waste (specify types and disposition)

G. SALES AND DISTRIBUTION

1. Sales volumes (in units and/or dollars)
2. Seasonal pattern of sales
3. Distribution methods and channels (types of customers, sales outlets, etc.)
4. Market area (total and areas of concentration)
5. Special markets (percentage of sales to government, prime contractors, large customers, export markets, etc.)
6. Storage of finished products (own facilities, public warehouses, etc.)
7. Shipment of finished products (rail, truck, air, etc.)

H. OTHER INFORMATION

1. Company and industry growth trends
2. Expansion or diversification plans
3. Major problems or obstacles to growth
4. Community advantages and disadvantages

* * *

Interviewer's Summary and Evaluation

Major assets

Major liabilities

Expansion or diversification possibilities

Company's contribution to need for satellite or service industries

Areas in which company could use direct assistance

Other comments

Appendix 2

SUMMARY TABLES

Table 1

GEOGRAPHICAL DISTRIBUTION OF MANUFACTURERS IN CARROLL COUNTY

<u>Location</u>	<u>Firms</u>		<u>Employment</u>	
	<u>Number</u>	<u>Percent</u>	<u>Number</u>	<u>Percent</u>
Carrollton	39	59.1	2,343	41.5
Villa Rica	14	21.2	924	16.3
Bowdon	7	10.6	1,654	29.3
Temple	3	4.6	446	7.9
Whitesburg	2	3.0	217	3.8
Mount Zion	<u>1</u>	<u>1.5</u>	<u>70</u>	<u>1.2</u>
TOTAL	66	100.0	5,654	100.0

Table 2

INDUSTRIAL DISTRIBUTION OF MANUFACTURERS IN CARROLL COUNTY

<u>Industry Group</u>	<u>Firms</u>		<u>Employment</u>	
	<u>Number</u>	<u>Percent</u>	<u>Number</u>	<u>Percent</u>
Food and Kindred Products	12	18.2	378	6.7
Textile Mill Products	21	31.8	1,628	28.8
Apparel and Related Products	6	9.1	1,785	31.6
Lumber and Wood Products	4	6.1	75	1.3
Furniture and Fixtures	5	7.6	90	1.5
Printing and Publishing	4	6.1	40	.7
Chemicals and Allied Products	2	3.0	33	.6
Rubber Products	2	3.0	175	3.1
Stone, Clay and Glass Products	3	4.5	30	.5
Primary and Fabricated Metals	5	7.6	885	15.7
Leather and Miscellaneous Products	<u>2</u>	<u>3.0</u>	<u>535</u>	<u>9.5</u>
TOTAL	66	100.0	5,654	100.0

Table 3
PRODUCTS MANUFACTURED IN CARROLL COUNTY

Food Products

Beverages (carbonated and fruit)
Broilers
Cottage cheese
Dairy products, miscellaneous (sour
cream, cream cheese, etc.)
Feed (cattle, poultry, swine)
Meats (cured, fresh, frozen)
Meats, speciality (including sausage)
Milk

Textile Products

Ball twines (cotton, paper, synthetic)
Braids (cotton, paper, synthetic)
Carpet yarns (rayon, nylon)
Colors (for printing material)
Cords (cotton, paper, synthetic)
Head bands (ladies')
Hosiery (cotton, nylon, wool)
Material (finished and printed)
Narrow fabric (cotton, rayon)
Novelty yarns (cotton, synthetic)
Screens (for printing material)
Stockinettes (for beef and ham)
Tape (Venetian blind)

Apparel and Related Products

Caps
Car coats
Hats
Slacks
Sport coats
Sport shirts
Suits
Topcoats
Tuxedos
Vests

Lumber and Wood Products

Lumber (dressed and rough)
Shell homes

Furniture and Fixtures

Bedding
Box springs
Cabinets (kitchen and utility)
Furniture (Early American living room)

Furniture and Fixtures (Continued)

Mattresses (air foam, cotton, inner-
spring)
Studio lounges

Printing and Publishing

Circulars
Newspapers
Printed business stationery

Chemicals and Allied Products

Cleaning compounds
Defoamers
Fertilizers
Hydraulic fluids
Lubricants
Rust preventives
Salts (metal treating)
Textile sizes

Rubber Products

Adhesives (tile)
Carpet backing sizing (latex emulsion)
Grips (handle bar)
Tires (lawn mower, toy)

Stone, Clay and Glass Products

Building block
Concrete
Drain tile
Monuments (granite, marble)

Metal Products

Automobile trim and accessories
Custom castings
Electrical conductor wire and cable
(aluminum and copper)
Hardware fittings
Metal plating (cadmium, chrome, zinc)
Pipe and tubing (high alloy, stainless
steel)

Leather and Miscellaneous Products

Metallic caskets
Shoes (children's, ladies')

Table 4
ORIGIN OF MANUFACTURING FIRMS IN CARROLL COUNTY

<u>Origin</u>	<u>Number of Firms</u>	<u>Percent</u>
Developed locally	51	77.3
Branch of Georgia company	8	12.1
Branch of national company	5	7.6
Moved to Carroll County from location within Georgia	1	1.5
Moved to Carroll County from location outside Georgia	<u>1</u>	<u>1.5</u>
TOTAL	66	100.0

Table 5
CARROLL COUNTY MANUFACTURING EMPLOYMENT BY INDUSTRY AND SEX

<u>Industry Group</u>	<u>Male</u>	<u>Female</u>	<u>Total</u>
Food and Kindred Products	250	128	378
Textile Mill Products	694	934	1,628
Apparel and Related Products	445	1,340	1,785
Lumber and Wood Products	68	7	75
Furniture and Fixtures	85	5	90
Printing and Publishing	33	7	40
Chemicals and Allied Products	29	4	33
Rubber Products	158	17	175
Stone, Clay and Glass Products	28	2	30
Primary and Fabricated Metals	849	36	885
Leather and Miscellaneous Products	<u>381</u>	<u>154</u>	<u>535</u>
TOTAL	3,020	2,634	5,654
PERCENT OF TOTAL	<u>53.4</u>	<u>46.6</u>	<u>100.0</u>

Table 6
CARROLL COUNTY MANUFACTURING EMPLOYMENT BY TYPE OF JOB

<u>Type of Job</u>	<u>Number</u>	<u>Percent</u>
Executive and administrative (including foremen, superintendents, etc.)	209	3.7
Technical and professional (including engineers, technicians, scientists)	78	1.4
Clerical and secretarial	150	2.7
Production (all levels below foreman, including maintenance, mechanics, janitorial, etc.)	5,137	90.8
Sales	67	1.2
Other (including trainees, part-time, etc.)	<u>13</u>	<u>.2</u>
TOTAL	5,654	100.0

Table 7

SELECTED WAGE RATES REPORTED BY CARROLL COUNTY MANUFACTURERS

<u>Type of Job</u>	<u>Rate Range</u> <u>(dollars per hour)</u>
Production Jobs	
Food industry	1.00 - 1.75
Textile industry	1.15 - 3.00
Apparel industry	1.15 - 2.00
Lumber industry	1.15 - 2.00
Furniture industry	1.15 - 2.50
Printing and publishing industry	1.15 - 3.05
Chemical industry	1.15 - 1.75
Rubber industry	1.15 - 2.00
Stone, clay and glass industry	1.25 - 1.70
Primary and fabricated metals industry	1.35 - 2.05
Clerical and Secretarial Jobs	
Textile industry	2.00
Chemical industry	1.25 - 1.50
Primary and fabricated metals industry	1.36 - 1.71
Technical Jobs	
Food industry	2.00
Primary and fabricated metals industry	3.00
Superintendent	
Food industry	2.38
Textile industry	1.60 - 3.00
Sales Jobs	
Food industry	1.50 - 2.13
Individual Job Classifications	
Boarder	1.26
Driver, mixer (cement)	1.25
Dye house worker	1.30
Finisher	1.34
Inspector	1.45
Knitting machine operator	1.15 - 1.45
Looper machine operator	1.30 - 1.50
Mechanic	1.60 - 2.25
Presser and cutter	1.75 - 2.10
Printing pressman	1.15 - 2.38
Sewing machine operator (apparel)	1.59 - 1.70
Sewing machine operator (textiles)	1.25 - 1.44
Weaver	1.55

Table 8

FRINGE BENEFITS REPORTED BY CARROLL COUNTY MANUFACTURERS

<u>Type of Benefit</u>	<u>No. of Firms</u>
Hospitalization and group insurance plans	47
Paid holidays	22
Paid vacations	10
Bonus plans	8
Retirement plans	4

Table 9

MANUFACTURERS' EVALUATION OF LOCAL LABOR SUPPLY

<u>Evaluation</u>	<u>Quantity</u>	<u>No. of Firms Commenting</u>
Quantity of local labor supply is good or plentiful		10
Quantity of local labor supply is adequate or satisfactory		35
Quantity of local labor supply is fair		4
<u>Specific shortages mentioned:</u>		
Maintenance mechanics	6	Male workers 1
Experienced workers	5	Plumbers 1
Clerical and secretarial	3	Supervisors 1
Educated workers	3	Tool and die makers 1
Welders	2	Willing young workers 1
Draftsmen	1	Woodworkers (carpenters) 1
Electricians	1	
<u>Evaluation</u>	<u>Quality</u>	<u>No. of Firms Commenting</u>
Quality of local labor supply is exceptional, excellent or very acceptable		8
Quality of local labor supply is good or satisfactory		15
Quality of local labor supply is adequate but untrained, adequate if selective, or fair		9
Not particularly good, poor or inferior		9
<u>Specific traits mentioned:</u>		
Dependable	6	Poor attitude 1
Good attitude	3	Pride and interest in work 1
Productive	3	Thoughtful 1
Trainable	3	Willing 1
Hard working	1	
Indifferent	1	

Table 10

REACTION OF CARROLL COUNTY MANUFACTURERS
TO AREA VOCATIONAL-TECHNICAL SCHOOL

<u>Response</u>	<u>Number of Firms</u>	<u>Employees Represented</u>
Expressed definite need for and interest in area vocational-technical school in Carroll County	21	2,261
Vocational-technical training not needed because of nature or size of operations	25	1,273
Expressed no opinion or were not interviewed	<u>20</u>	<u>2,120</u>
TOTAL	66	5,654

Types of Training Needs Specified by Manufacturers

<u>Training Need</u>	<u>Number of Mentions</u>
Maintenance mechanics	11
Machinist	4
Office, clerical and secretarial	4
Supervisory training	4
Carpentry and woodworking	2
Electricity	2
Plumbing	2
Welding	2
Agriculture	1
Annealing	1
Blueprint reading	1
Communications	1
Cord operations	1
Extruding	1
Linotype operation	1
Metalworking	1
Printing	1
Sewing machine operation	1
Shop procedures	1

Table 11

MATERIALS AND SUPPLIES USED BY CARROLL COUNTY MANUFACTURERS

Food Industry

Bags (burlap, paper)
 Bottles (glass)
 Boxes (corrugated cardboard)
 Broilers
 Caps (bottle)
 Cartons (cardboard)
 Cattle
 Chocolate powder
 Concentrates
 Corn
 Dispensers (milk)
 Feed (dairy)
 Fertilizers
 Grain
 Hay
 Hogs
 Hulls
 Ice
 Meal (alfalfa, cottonseed, soybean)
 Milk
 Minerals
 Packaging material
 Paper
 Pulp (citrus)
 Salt
 Spices
 Sterilizers
 Sugar
 Wax
 Wire tires

Textile Industry

Art equipment
 Bags (polyethylene)
 Bleach
 Boxes (corrugated)
 Boxes (paper)
 Cartons (cardboard)
 Cores
 Cotton (raw)
 Dyes (for yarn)
 Machine parts
 Needles
 Polishing materials (for yarn)
 Screens (Dacron)
 Sizing (wax gum finish)
 Spools (cardboard)
 Yarn (Banlon, Orlon, cotton, nylon, rayon)
 Yarn (elastic)
 Wool

Apparel Industry

Boxes (corrugated)
 Button parts
 Hair cloth
 Packaging material
 Piece goods (cotton, Dacron, woolen, worsted)
 Pocketing
 Shoulder pads
 Thread
 Visor board
 Waist band

Lumber Industry

Bathsets
 Bits
 Doors
 Drills
 Gas (diesel)
 Locks
 Lumber (fir, hardwood, pine)
 Paint
 Roofing
 Saws
 Sheet rock
 Windows

Furniture Industry

Bags (mattress)
 Belts (leather drive)
 Blades
 Cartons
 Cotton (waste)
 Glues
 Hardware, hinges and accessories
 Linters
 Lumber (birch, poplar)
 Mattress ticking
 Muslin
 Net (dixie)
 Paints and finishes
 Plywood (gum)
 Sandpaper
 Saws
 Sheets (plastic)
 Springs (furniture and mattress)
 Tape
 Thinner
 Welt Cord
 Wrapping paper

Table 11
MATERIALS AND SUPPLIES USED BY CARROLL COUNTY MANUFACTURERS
(Continued)

Printing Industry

Binding (plastic)
Chemicals
Glue
Ink
Paper
Paste
Plates (offset)
Tape (pressure sensitive)
Tape (teletype)
Wire (stitching)

Chemical Industry

Acids (fatty, sulphuric, other)
Ammonium nitrite
Bags (paper)
Containers (metal)
Drums (fiber)
Limestone
Maintenance supplies
Nitrogen (liquid)
Oils (petroleum)
Potash
Propylene glycol
Rock dust
Soda (caustic)
Tallow

Rubber Industry

Anti-oxidents
Boxes (cardboard)
Cans
Curing agents
Drums
Fillers
Kaolin
Latex
Limestone
Pigments
Rubber (isoprene, mineral, reclaimed)
Rubber (master batch)
Soap stabilizers
Thickeners (synthetic)

Leather Industry

Boxes (cardboard)
Cement
Leather
Sole material
Thread

Stone, Clay and Glass Industry

Belts (sanding)
Cement
Chisels (carbon)
Galite
Granite
Gravel
Marble
Polishes
Sand
Saws (diamond)
Stencils

Metalworking Industry

Aluminum
Belts (sanding)
Boxes
Buffing compounds
Chemicals (HNO_3 , H_3PO_4 , H_2SO_4)
Copper
Files
Foundry supplies
Lubricants
Packaging (cardboard)
Plating supplies
Polishing supplies
Reels (wooden)
Resins (plastic)
Rubber
Soda
Steel (high carbon, stainless)
Yarn
Zinc

Table 12

OUT-OF-COUNTY SERVICES USED BY CARROLL COUNTY MANUFACTURERS

<u>Service Obtained from Outside County</u>	<u>Number of Firms</u>
Accounting and auditing	27
Banking	10
Machine shop	8
Design	4
Advertising	3
Consulting	3
Tool and die work	3
Engineering	2
Architectural	1
Factoring	1
Legal	1
Printing	1

Table 13

MARKET AREAS SERVED BY CARROLL COUNTY MANUFACTURERS

<u>Industry Group</u>	<u>Local</u>	<u>Regional</u>	<u>National</u>	<u>International</u>
Food and Kindred Products	9	1	2	-
Textile Mill Products	2	2	15	2
Apparel and Related Products	-	1	5	-
Lumber and Wood Products	2	1	1	-
Furniture and Fixtures	2	2	1	-
Printing and Publishing	4	-	-	-
Chemicals and Allied Products	1	-	1	-
Rubber Products	-	1	-	1
Stone, Clay and Glass Products	3	-	-	-
Primary and Fabricated Metals	-	-	3	2
Leather and Miscellaneous Products	<u>-</u>	<u>1</u>	<u>1</u>	<u>-</u>
TOTAL	23	9	29	5

Definition of market areas:

Local - products distributed primarily in Carroll County and surrounding counties in the west Georgia area.

Regional - products distributed primarily in Georgia and at least one other southeastern state.

National - some products distributed outside the Southeast. Includes one firm which primarily serves a local market but which ships to one large customer in the Midwest.

International - some products distributed outside the continental United States. All firms with export trade also serve the national market.

Table 14

PRODUCTION CAPACITY USED BY CARROLL COUNTY MANUFACTURERS

Number of firms operating at:

<u>Industry Group</u>	<u>Maximum Capacity</u>	<u>75% - 99% of Capacity</u>	<u>50% - 74% of Capacity</u>	<u>25% - 49% of Capacity</u>	<u>1% - 24% of Capacity</u>	<u>Unknown</u>
Food and Kindred Products	3	3	1	1	-	4
Textile Mill Products	10	2	6	1	-	2
Apparel and Related Products	3	-	-	-	-	3
Lumber and Wood Products	-	-	2	-	1	1
Furniture and Fixtures	1	-	3	-	-	1
Printing and Publishing	-	1	-	-	-	3
Chemicals and Allied Products	1	1	-	-	-	-
Rubber Products	-	1	-	-	1	-
Stone, Clay and Glass Products	2	-	-	-	-	1
Primary and Fabricated Metals	1	2	-	-	-	2
Leather and Miscellaneous Products	<u>1</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>1</u>
TOTAL	22	10	12	2	2	18
PERCENT OF TOTAL	33.3	15.2	18.2	3.0	3.0	27.3

Table 15

COMMUNITY ADVANTAGES AND DISADVANTAGES
MENTIONED BY CARROLL COUNTY MANUFACTURERS
(In descending order of frequency)

Advantages

Excellent people
Good educational and religious facilities
Central location to serve present and future market
Abundant supply of good quality labor
Good transportation services
Pleasant year-round weather
Satisfactory local business

Disadvantages

Unsatisfactory city administration policies (Carrollton)
Inadequate sewage facilities (Bowdon)
Increased utility rates because of recent gas explosion
(Villa Rica)
Poor road conditions (Carrollton)
Poor rail service
Lack of competent labor force
Lack of training facilities
Poor attitude of uptown merchants in community betterment
campaigns (Carrollton)

Appendix 3

CARROLL COUNTY MANUFACTURERS BY CITY AND INDUSTRY
(July 1962)

Employment Code

A - 1 - 25	G - 251 - 300
B - 26 - 50	H - 301 - 400
C - 51 - 100	I - 401 - 500
D - 101 - 150	J - 501 - 1,000
E - 151 - 200	K - 1,001 - 1,500
F - 201 - 250	L - 1,501 - 2,000

BOWDON

SIC 204 - Grain Mill Products

Culpepper Milling Company (A)
Johnson Avenue, P. O. Box 641
Jack Culpepper, President
Established 1930

Ozier's Feed Mill, Inc. (A)
Depot Street
C. C. Ozier, President
Established 1952

SIC 231 - Men's and Boys' Suits, Coats and Overcoats

Bremen-Bowdon Investment Company (K)
(Warren Sewell Clothing Company)
Commercial Street
Warren P. Sewell, Sr., President
Established 1933

SIC 232 - Men's and Boys' Furnishings

Lamar Manufacturing Company (G)
City Hall Avenue
L. R. Plunkett, President
Established 1955

Smithfield Development Corporation (A)
Smithfield Road
James Davis, Plant Manager
Established 1962

SIC 271 - Newspaper Publishing and Printing

The Bowdon Bulletin (A)
City Hall Avenue
Kate Smith, Owner
Established 1890

BOWDON (Continued)

SIC 301 - Miscellaneous Tires and Rubber Products

The Textile Rubber Company (E)
Wedowee Road
W. W. Copeland, Exec. Vice President
Established 1941

CARROLLTON

SIC 201 - Meat Products

Duffey's Sausage Company (C)
601 Clifton Terrace
D. A. Duffey, President
Established 1950

Fletcher's Sausage Company (A)
146 Watson Street
J. M. Fletcher, Owner
Established 1949

Moore's Sausage and Meats (A)
Ward Street
R. O. Moore, Owner
Established 1937

Skinner Poultry Company (E)
619 Alabama Street
Q. P. Skinner, President
Established 1946

SIC 202 - Dairy Products

Carroll Creamery Co-operative (B)
1004 North Park Avenue
R. J. Holcomb, General Manager
Established 1951

SIC 204 - Grain Mill Products

Aycock Gins (A)
Aycock Street
J. A. Aycock, President
Established 1945

Georgia Broiler Supply, Inc. (A)
505 Maple Street
L. D. McCleskey, Manager
Established 1953

CARROLLTON (Continued)

SIC 204 - Grain Mill Products (Continued)

Traylor's Mill (A)
Fertilla Street
William Traylor, Jr., Owner
Established 1955

SIC 208 - Beverages

Coca-Cola Bottling Company (A)
217 Alabama Street
W. A. Hooper, Plant Manager
Established 1907

SIC 224 - Narrow Fabrics

Morris Manufacturing Company (A)
Aycock Street
J. W. Morris, President
Established 1946

Wollun Products Corporation (B)
205 Johnson Avenue
D. L. Wollner, President
Established 1947

SIC 225 - Knitted Fabrics

Carroll Mills, Inc. (C)
202 Bradley Street
J. R. Newell, President
Established 1924

Lawler Hosiery Mills (F)
301 Bradley Street
J. G. Lawler, President
Established 1927

Lovvorn Hosiery Mill (A)
Newman Road
J. E. Lovvorn, President
Established 1961

Maryon Hosiery Mill, Inc. (D)
506 Maple Street
T. F. Hirsch, President
Established 1937

SIC 226 - Dying and Finishing of Textiles

Georgia Hand Prints, Inc. (A)
320 Aycock Street
Al Parin, President
Established 1959

CARROLLTON (Continued)

SIC 226 - Dying and Finishing of Textiles (Continued)

Printed Fabrics Corporation (E)
Lovvorn Road
C. H. Lumpkin, President
Established 1954

SIC 228 - Yarn and Thread

J. R. Newell Manufacturing Company (C)
Lovvorn Road
J. R. Newell, President
Established 1953

SIC 229 - Cordage and Twine

Fuller Braid Mill (A)
502 Bradley Street
J. T. Fuller, Owner
Established 1947

Quality Mills, Inc. (C)
Aycock Road
H. G. Baker, President
Established 1953

SIC 242 - Sawing and Planing of Lumber

Hester Bennett Lumber Company (A)
914 Dixie Street
Hester Bennett, President
Established 1942

Carroll Lumber Company (A)
Old Roopville Road
Chester Owens, Owner
Established 1958

H. W. Richards Lumber Company (B)
851 Cedar Street
H. W. Richards, President
Established 1947

SIC 251 - Household Furniture

Carroll Mattress Company (A)
222 Newnan Road
G. M. Thomas, President
Established 1945

J. B. Stallings Cabinet Shop (A)
109 Harmon Avenue
J. B. Stallings, Owner
Established 1949

CARROLLTON (Continued)

SIC 271 - Newspaper Publishing and Printing

Carroll Publishing Company (A)
Harris Street
Stanley Parkman, President
Established 1945

SIC 275 - Commercial Printing

Thomasson Printing and Office Supply Company (A)
214 Alabama Street
F. T. Thomasson, Jr., President
Established 1942

SIC 281 - Industrial Chemicals

E. F. Houghton and Company (A)
Garrett Street
David T. Barrow, Plant Manager
Established 1958

SIC 287 - Agricultural Chemicals

Cotton Producers Association (A)
Fertilla Road
J. L. Hollingsworth, Plant Manager
Established 1940

SIC 306 - Fabricated Rubber Products

Testworth Laboratories of Georgia, Inc. (A)
Lovvorn Road
Jerry Buchanan, Plant Manager
Established 1955

SIC 314 - Footwear

Genesco, Inc. (E)
510 Alabama Street
Carmen Morrow, Superintendent
Established 1946

SIC 327 - Concrete, Gypsum and Plastic Products

Hearn Monument Company (A)
535 Newman Road
Glenn R. Larrett, Plant Manager
Established 1894

Hollingsworth Concrete Products, Inc. (A)
Fertilla Road
L. Hollingsworth, President
Established 1959

CARROLLTON (Continued)

SIC 327 - Concrete, Gypsum and Plastic Products (Continued)

West Georgia Concrete Products Company (A)
Railroad Avenue
Bob Hollingsworth, President
Established 1960

SIC 331 - Rolling and Finishing Mills

Trent Tube Company (B)
Alabama Street
G. L. Amrhein, General Manager
Established 1961

SIC 335 - Extruding of Nonferrous Metals

Southwire Company (J)
Fertilla Road
Roy Richards, President
Established 1950

SIC 336 - Nonferrous Foundries

Industrial Foundries (B)
164 Watson Street
J. W. Wilson, President
Established 1946

SIC 346 - Stamping of Metal Products

Douglas & Lomason Company (F)
Alabama Street
Vince L. Cashen, Plant Manager
Established 1955

SIC 347 - Coating, Engraving and Allied Services

D. & L. Plating Corp. (C)
Alabama Street
George W. Taylor, President
Established 1959

MOUNT ZION

SIC 231 - Men's and Boys' Suits, Coats and Overcoats

Ray Sewell Industries (C)
C. Ray Sewell, President
Established 1956

TEMPLE

SIC 231 - Men's and Boys' Suits, Coats and Overcoats

Sewell Manufacturing Company (F)
R. E. Rivers, General Manager
Established 1953

SIC 251 - Household Furniture

Parrish Cabinet Company (A)
Route 1
L. P. Parrish, Owner Manager
Established 1941

Style Crest Furniture Company (B)
Montgomery Street
C. R. Truitt, Mill Superintendent
Established 1956

VILLA RICA

SIC 204 - Grain Mill Products

Villa Rica Feed Mill (A)
Temple Street
N. F. Ingram, Manager
Established 1902

SIC 225 - Knitted Fabrics

J. C. Brown Hosiery Mill (C)
316 Bankhead Highway
J. C. Brown, President
Established 1940

Carroll Hosiery Mill (A)
Route 1 (Bankhead Highway)
Frank Carroll, Owner
Established 1962

Easterwood Hosiery Mill (C)
Public Square, P. O. Box 147
T. G. Hooten, Manager
Established 1946

Golden City Hosiery Mills, Inc. (C)
122 Public Square
H. Grady, Owner
Established 1960

Jean Hosiery Mill, Inc. (E)
Old Town Road
H. Grady, Owner
Established 1942

VILLA RICA (Continued)

SIC 225 - Knitted Fabrics (Continued)

Matthews Hosiery Mill (B)
Walker Street
Ray Matthews, Owner Manager
Established 1952

Villa Rica Hosiery Mill (D)
Fullerville Street
J. H. Vaughn, Manager
Established 1914

SIC 228 - Yarn and Thread Mills

Banning Yarn Mills, Plant No. 2 (C)
Fullerville Street
G. L. Kirkpatrick, Plant Manager
Established 1961

SIC 235 - Hats, Caps and Millinery

Camp Cap Company (C)
Public Square
W. P. Camp, President
Established 1933

SIC 242 - Sawmills and Planing Mills

Villa Rica Lumber Company (A)
Fullerville Street
Bill Matthews, Manager
Established 1936

SIC 251 - Household Furniture

Georgia Maid Cabinet Company (A)
(Douglas County)
Bankhead Highway, P. O. Box 549
F. A. Brown, President
Established 1955

SIC 271 - Newspaper Publishing and Printing

The Villa Rican (A)
210 Public Square
Robby H. Robinson, Owner
Established 1920

SIC 398 - Miscellaneous Manufacturing

Atlanta Metallic Casket Company (H)
Rockmart Road
John Jenkins, Manager
Established 1950

WHITESBURG

SIC 228 - Yarn and Thread

Banning Yarn Mills, Inc. (C)
Plant No. 1
Whitesburg, Route 1
R. L. Kimsey, Owner
Established 1961

SIC 229 - Cordage and Twine

West Georgia Mills, Inc. (D)
Gibson LaFoy, President
Established 1957